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Men's Tailored Clothing/Separates; Rainwear

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director

Kenneth Greenman, Research Analyst

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TABLE OF CONTENTS

Page

MARKET TRENDS.......... 1

AT THE MANUFACTURER LEVEL:

- GENERAL INDUSTRY STATISTICS.......... 2
  - INDUSTRY SHIPMENTS.......... 4
  - EMPLOYMENT & EARNINGS.......... 4
  - INDUSTRY CONCENTRATION.......... 5
  - PLANT CAPACITY UTILIZATION.......... 9
  - OPERATING RATIOS.......... 9
  - INDUSTRY LOCATION.......... 10
- PRODUCTION.......... 11
  - BY FABRIC.......... 13
  - MATERIALS CONSUMED IN PRODUCTION.......... 15
  - SEASONAL PATTERNS IN PRODUCTION.......... 15
- PRODUCT SHIPMENTS.......... 16
  - CONCENTRATION OF PRODUCT SHIPMENTS.......... 17
  - BY GEOGRAPHIC REGION.......... 18
- PRODUCER PRICE TRENDS.......... 20
- FOREIGN TRADE.......... 21
- TOTAL DOMESTIC SUPPLY.......... 22

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET.......... 23
- EMPLOYMENT.......... 23
- RETAIL SALES.......... 25
  - BY TYPE OF OUTLET.......... 25
  - BY STORE TYPE.......... 27
  - BY AREA.......... 29
- RETAIL ADVERTISING.......... 30
- CONSUMER PRICE TRENDS.......... 30
- CONSUMER BUYING PRACTICES.......... 31

SCHEDULE OF ADDITIONAL FACT FILES.......... 35

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E. B. Gold, Manager
Fairchild Book Division

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MEN'S TAILORED CLOTHING, SEPARATES AND RAINWEAR

Market Trends

Following a period of a depressed consumer market for men's suits in the mid-1980's, a predicted revival has become a reality and advance buying by retailers indicates a good Fall 1988 season. The most significant factor triggering this upsurge is the introduction of and surprisingly quick consumer response to the international model, a hybrid that borrows the best of both traditional and European lines, with a wider point-to-point shoulder measurement. "Crossover" suits team typically British fabrics with Italian details and vice versa. Pleated pants help these suits to make their fashion statement.

New international models have given the retail suit business a new lease on life with better price points and without the need to resort to promotional tactics. This has left stores' inventories clean, leading to optimistic predictions by clothing executives that 1988 will be the second banner year in a row for suits, providing the U.S. economy does not sink into a severe recession and also providing costs can be controlled in spite of spiraling fiber prices, particularly for wool.

Also fueling the swelling suit business are double-breasteds, which are making an impact at virtually every level of the market, especially big-ticket items. Usually they account for about 6-7% of volume but currently they are accounting for about 15% and could go to 20%. Some manufacturers forecast that they'll do 40% in the model for Spring 1988, a figure described as unrealistic by others. Double-breasteds are gaining acceptance with younger contemporary men as well as the more mature customer, a significant feat considering changing societal attitudes toward appropriate business attire.

Part of the decline in tailored clothing a few years back has been attributed to more relaxed business environments. As offices move to suburban business malls, a more casual, comfortable dress code has evolved, with many business men and professionals wearing sport coats and slacks rather than suits. How designers develop a product that will make customers want to buy and wear tailored clothing in cases where it is no longer mandatory has long-term implications for the industry.

A return to the production of men's tailored overcoats and topcoats as well as expanded offerings of wool fabrics are aimed at this revived market. Several fabric suppliers, including those selling both domestic and imported woolens, see promising 1988 sales, following strong 1986 and 1987 retail sales. Many in the business attribute the strength of the current market to young men in the U.S. and Europe who "discovered" the once-popular overcoats and topcoats left over from earlier eras in thrift shops, then went on to buy new versions. Others attribute the comeback to young urban professionals' purchases of cashmere and camel hair coats for instant status.

Some market observers feel the present popularity of topcoats is caused by a purely cyclical, long overdue slowdown in raincoat sales, which have peaked after more than a decade. Rainwear retailers, however, still foresee conservative sales growth, pinning their hopes on more fashion-oriented models and the opportunity it presents to do more full-priced selling. They draw confidence from men's recent acceptance of fashion styling in topcoats. Rainwear's promotional past, on the other hand, has trained many shoppers to wait for sales, making the higher-priced fashion end of the business difficult.

Market Trends (continued)

In general, the outlook for the men's tailored clothing business is clouded by recent developments in the stock market, and the lowering of consumers confidence in the economy, as well as sharp increases in costs. Better men's wear business has been expanding in recent years, and it is argued in some quarters that cutbacks by customers, if any are made, will tend to fall more heavily on hard goods--cars, appliances, etc., rather than apparel.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all U.S. manufacturers is compiled every five years by the U.S. Bureau of the Census. Results from the latest (1982), covering operations in the men's tailored industry, are detailed below. Also, comparable data has been reported by the Census Bureau for 1984 and 1985 in the Annual Survey of Manufactures. These surveys are a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity during intercensal periods.

Men's & Boys' Suits & Coats (SIC 2311*)

	1985	1984	1982	% Change 1985/84
Number of companies	na	na	443	--
Number of establishments, total**	na	433	528	--
Number with 20 or more employees	na	289	343	--
Employees, total (thous.)	64.9	73.9	75.0	- 12.2%
Production workers (thous.)	57.4	63.9	64.8	- 10.2
Payroll (mil. $)	$ 862.5	$ 916.5	$ 876.7	- 5.9
Value added by manufacture# (mil. $)	$1,879.8	$1,788.9	$1,681.2	+ 5.1
Value of shipments ## (mil. $)	$3,321.0	$3,208.8	$3,059.7	+ 3.5
Capital expenditures, new (mil. $)	23.8	38.0	$ 24.6	- 37.4
Machinery & equipment (mil. $)	17.7	27.8	17.0	- 36.3

Men's & Boys' Separate Trousers (SIC 2327*)

	1985	1984	1982	% Change 1985/84
Number of companies	na	na	269	--
Number of establishments, total**	na	317	356	--
Number with 20 or more employees	na	240	268	--
Employees, total (thous.)	49.7	54.8	56.9	- 9.3%
Production workers (thous.)	42.5	48.1	49.4	- 11.6
Payroll (mil. $)	$ 592.3	$ 612.6	$ 564.9	- 3.3
Value added by manufacture# (mil. $)	$1,122.4	$1,237.7	$1,111.2	- 9.3
Value of shipments ## (mil. $)	$2,234.9	$2,373.2	$2,165.4	- 5.8
Capital expenditures, new (mil. $)	32.2	30.1	$ 35.7	+ 7.0
Machinery & equipment (mil. $)	26.2	21.0	30.6	+ 24.8

(continued)

GENERAL INDUSTRY STATISTICS

Waterproof Outer Garments (SIC 2385*)

	1985	1984	1982	% Change 1985/84
Number of companies	na	na	98	--
Number of establishments, total**	na	102	112	--
Number with 20 or more employees	na	74	76	--
Employees, total (thous.)	8.3	9.1	9.3	- 8.8%
Production workers (thous.)	7.3	7.9	8.0	- 7.6
Payroll (mil. $)	$ 95.6	$ 91.1	$ 101.1	+ 4.9
Value added by manufacture# (mil. $)	$ 182.9	$ 199.9	$ 246.0	- 8.5
Value of shipments ## (mil. $)	$ 386.1	$ 407.0	$ 449.2	- 5.1
Capital expenditures, new (mil. $)	5.0	2.1	$ 4.6	+138.1
Machinery & equipment (mil. $)	2.1	0.9	3.0	+133.3

na not available

* SIC Industry definitions:

2311 Establishments primarily engaged in manufacturing men's, youth's, and boys' suits, coats and overcoats, as well as tailored dress and sport-coats. Establishments primarily engaged in manufacturing uniforms (military, policemen's, firemen's, etc.) are also included. Those manufacturers engaged primarily in making work and sport garments are not included.

2327 Establishments primarily engaged in manufacturing men's, youth's, and boys' separate slacks and trousers.

2385 Establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outer garments made from such material as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children.

** Covers manufacturing establishments (plants) only, and each location is separately counted. Not included are separate auxiliary locations serving the plants (i.e. administrative offices, purchasing offices, sales promotion offices, etc.) Information on establishments in 1984 is from the Census Bureau's County Business Patterns.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes, the best value of measure of individual industries.

## Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made in these industries. The value of the primary product alone (men's furnishings) of these industries, plus the value of these products produced by manufacturers classified in other industries, identified as "product shipments," are shown on pages 16-19.

Source: U.S. Bureau of the Census:
1982 Census of Manufactures,
1985, 1984 Annual Survey of Manufactures.

GENERAL INDUSTRY STATISTICS

Industry Shipments

Based on data compiled by the Census Bureau, the International Trade Administration (U.S. Department of Commerce) compiles annual projections covering both industry and product shipments on a constant dollar basis for various apparel classifications. Estimates for 1985 and 1986 compared with revised 1984 figures are noted below. These figures show industry "real" growth, eliminating the effects of inflation.

Following a real decline of 5.2% in 1985, industry shipments of men's & boys' separate trousers is estimated to have gained 1.5% in 1986. For suits and coats, a real decline of 1.2% in 1986 followed a fall of 4.1% in 1985.

Value of Industry Shipments of Specified Men's & Boys' Tailored Wear: 1984-1986
(Value in millions of 1982 dollars)

				Percent Change		Compound Annual Growth Rate
	1986(e)	1985(e)	1984	1986/85	1985/84	1979-84
Suits & coats (SIC 2311)	$2,878	$2,913	$3,036	- 1.2%	- 4.1%	- 1.4%
Trousers (SIC 2327)	$2,183	$2,151	$2,269	+ 1.5%	- 5.2%	- 0.9%

(e) estimated

Source: U.S. Department of Commerce,
International Trade Administration:
1987 U.S. Industrial Outlook.

Employment & Earnings

Employment data for 1985 and 1986, and August 1986 and 1987 reflects downsizing in the number of production workers in both SIC classifications while the number of non-production personnel remained constant. It should be noted that employment and earnings data issued by the Bureau of Labor Statistics and the Census Bureau are not directly compatible due to differences in methodology used by each agency in compiling the figures.

GENERAL INDUSTRY STATISTICS

Employment & Earnings (continued)

Employment & Earnings of Selected Men's & Boys' Tailored Wear Industries

	August Averages			Annual Averages		
	1987	1986	% Change 1987/86	1986	1985	% Change 1986/85
Men's & boys' suits & coats:						
All employees (thous.)	56.5	59.3	- 4.7%	60.7	63.7	- 4.7%
Production workers (thous.)	48.6	51.0	- 4.7	52.2	55.6	- 6.1
Average weekly earnings	$237.35	$225.69	+ 5.2	$237.14	$232.75	+ 1.9
Average weekly hours	35.8	34.3	+ 4.4	35.5	35.0	+ 1.4
Average overtime hours	1.2	0.7	+71.4	0.9	0.8	+12.5
Men's & boys' separate trousers:						
All employees (thous.)	54.1	55.6	- 2.7%	55.9	57.5	- 2.7%
Production workers (thous.)	47.3	48.9	- 3.3	48.9	50.4	- 3.0
Average weekly earnings	$195.45	$188.08	+ 3.9	$193.09	$191.33	+ 0.9
Average weekly hours	37.3	36.1	+ 3.3	36.5	36.1	+ 1.1
Average overtime hours	1.5	0.6	+150.0	1.0	1.2	-16.7

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Industry Concentration

Single & Multiunit Companies Share of Shipments: 1982

		Plants		Employees		Value of Industry Shipments	
	Companies	No.	%	Thous.	%	Thous.	%
Men's & boys' suits & coats	443	529	100.0%	75.2	100.0%	$3,061.5	100.0%
Multiunit companies	97	183	34.6	51.9	69.0	2,309.2	75.4
Single unit companies	346	346	65.4	23.3	31.0	752.3	24.6
Men's & boys' separate trousers	269	356	100.0	56.9	100.0	2,165.4	100.0
Multiunit companies	71	158	44.4	40.3	70.8	1,645.1	76.0
Single unit companies	198	198	55.6	16.6	29.2	520.3	24.0
Waterproof outergarments	98	112	100.0	9.3	100.0	449.2	100.0
Multiunit companies	31	45	40.2	6.3	67.7	312.2	69.5
Single unit companies	67	67	59.8	3.0	32.3	136.9	30.5

Source: U.S. Bureau of the Census:
1982 Census of Manufactures,
Type of Organization, Subject Series MC82-S-5.

GENERAL INDUSTRY STATISTICS

Industry Concentration

Share of Value of Industry Shipments Accounted For By The Largest Companies

	No. of Companies	Total (mil. $)	Value of Industry Shipments % Accounted for by largest companies			
			4 largest	8 largest	20 largest	50 largest
Men's & boys' suits & coats						
1982	443	$3,061.5	25%	37%	57%	75%
1977	619	2,767.5	21	32	48	67
1972	721	2,396.9	19	31	48	65
Men's & boys' separate trousers						
1982	269	2,165.4	30	45	64	83
1977	404	1,718.0	25	40	59	77
1972	463	1,745.0	29	41	60	76
Waterproof outergarments						
1982	98	449.2	49	64	84	97
1977	157	348.8	41	52	70	90
1972	236	332.1	31	40	56	79

Source: U.S. Bureau of the Census:
1982 Census of Manufactures,
Concentration Ratios in Manufacturing MC82-S-7.

Number of Companies With Shipments of Specified Products Valued At $100,000 Or More: 1977, 1982

	1982	1977
Men's:		
Suits (including leisure & uniform)	89	171
Coats (including uniform)	42	72
Dress & sport coats & jackets	108	142
Men's & boys':		
Dress & sport trousers (including uniform)	157	218
Men's, women's & children's:		
Raincoats & rain capes	58	70

Source: U.S. Bureau of the Census:
1982 Census of Manufactures (MC82-1-23B;D).

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

The Men's Tailored Wear Industry by Employment Size, 1982

	Establishments		Value Added by Manufacture		Industry Shipments	
	Number	Percent	(Mil.$)	Percent	Mil. $	Percent
Men's & boys' suits & coats, total	528	100.0%	$1,681.2	100.0%	$3,059.7	100.0%
By establishment size:						
Under 10 employees	128	24.2	34.5	2.1	66.4	2.2
10 - 49 employees	138	26.1	141.4	8.4	359.4	11.7
50 - 249 employees	168	31.8	412.7	24.5	866.9	28.3
250 or more employees	94	17.8	1,092.6	65.0	1,767.1	57.8
Separate trousers, total	356	100.0	1,112.2	100.0	2,165.4	100.0
By establishment size:						
Under 10 employees	68	19.1	10.3	0.9	31.5	1.5
10 - 49 employees	62	17.4	72.5	6.5	190.7	8.8
50 - 249 employees	149	41.9	341.5	30.7	639.6	29.5
250 or more employees	77	21.6	686.9	61.8	1,303.6	60.2
Waterproof outergarments, total	112	100.0	246.0	100.0	449.2	100.0
By establishment size:						
Under 10 employees	20	17.9	(D)	--	(D)	--
10 - 49 employees	50	44.6	34.0	13.9	75.4	16.8
50 - 249 employees	30	26.8	83.5	33.9	167.2	37.2
250 or more employees	12	10.7	(D)	--	(D)	--

(D) Withheld to avoid disclosure by Census Bureau.

Source: U.S. Bureau of the Census:
1982 Census of Manufactures.

Employment Size of Plants in the Men's Tailored Wear Industry & Rainwear Industry By Type of Operation: 1982

	Manufacturers		Jobbers		Contractors	
	Number	Percent	Number	Percent	Number	Percent
Suits & coats (incl. boys')						
Plants, total	195	100.0%	82	100.0%	251	100.0%
Number of employees:						
1 - 19	63	32.3	45	54.9	77	30.7
20 - 99	47	24.1	23	28.0	84	33.5
100 or more	85	43.6	14	17.1	90	35.9
Separate trousers (incl. boys')						
Plants, total	139	100.0	53	100.0	164	100.0
Number of employees:						
1 - 19	37	26.6	28	52.8	23	14.0
20 - 99	33	23.7	15	28.3	34	20.7
100 or more	69	49.6	10	18.9	107	65.2

(continued)

Industry Concentration (continued)

Employment Size of Plants in the Men's Tailored Wear Industry & Rainwear Industry By Type of Operation: 1982
(continued)

	Manufacturers		Jobbers		Contractors	
	Number	Percent	Number	Percent	Number	Percent
Rainwear (incl. women's)						
Plants, total	44	100.0	23	100.0	45	100.0
Number of employees:						
1 - 19	14	31.8	9	39.1	13	28.9
20 - 99	16	36.4	13	56.5	23	51.1
100 or more	14	31.8	1	4.3	9	20.0

Source: U.S. Bureau of the Census:
1982 Census of Manufactures.

Number of Men's Tailored Wear Manufacturing Plants By Employment Size: 1984, 1983

	1984		1983	
	Number	Percent	Number	Percent
Suits & coats (incl. boys')	433	100.0%	467	100.0%
By establishment size:				
Under 20 employees	144	33.3	163	34.9
20 - 49 employees	54	12.5	64	13.7
50 - 99 employees	64	14.8	62	13.3
100 or more employees	171	39.5	178	38.1
Separate trousers (incl. boys')	317	100.0	377	100.0
By establishment size:				
Under 20 employees	77	24.3	85	25.2
20 - 49 employees	34	10.7	27	8.0
50 - 99 employees	33	10.4	40	11.9
100 or more employees	173	54.6	185	54.9
Rainwear (incl. women's)	102	100.0	337	100.0
By establishment size:				
Under 20 employees	28	27.5	27	25.7
20 - 49 employees	30	29.4	30	28.5
50 - 99 employees	17	16.7	18	17.1
100 or more employees	27	26.5	30	28.5

Source: U.S. Bureau of the Census:
County Business Patterns, 1983, 1984.

GENERAL INDUSTRY STATISTICS

Plant Capacity Utilization

For the fourth quarter of 1985, men's and boys' suit and coat manufacturers in the U.S. operated at 94% of the preferred rate compared with 87% in 1983 and 84% in 1982. The preferred rate is defined as a level, normally between actual operations and practical capacity, which the manufacturer would prefer not to exceed due to cost or other considerations. The following figures represent the ratio of actual utilization to the preferred level of operations.

Capacity Utilization Rates: Fourth Quarter 1982 - 1985

Industry	1985	1984	1983	1982
Suits & coats (men's & boys')	94%	na	87%	84%
Separate trousers (men's & boys')	na	na	81	86
Rainwear (men's & women's)	na	63%	96	100

na not available

Source: U.S. Bureau of the Census:
Current Industrial Reports,
Survey of Plant Capacity Utilization, 1985 MC-CI(85)1.

Operating Ratios

	Men's & Boys' Suits & Coats			
	1982	1980	1977	1972
Payroll per employee	$11,689	$10,277	$ 8,330	$ 6,172
Production workers:				
% of total employment	86	87	87	87
Annual hours	1,789	1,798	1,774	1,789
Avg. hourly earnings	$ 5.65	$ 4.62	$ 4.22	$ 3.15
Cost of materials as a % of value of shipments	46	44	45	44
Cost of materials and payroll as a % of value of shipments	74	75	74	77
Value added per employee	$22,416	$19,322	$15,951	$10,755
Payroll as a % of value added	52	53	52	57
Value added per production worker hour	$ 14.43	$ 12.38	$ 10.30	$ 6.93

(continued)

GENERAL INDUSTRY STATISTICS

Operating Ratios (continued)

	Men's & Boys' Separate Trousers			
	1982	1980	1977	1972
Payroll per employee	$ 9,928	$ 8,239	$ 6,685	$ 4,821
Production workers:				
% of total employment	87	87	87	90
Annual hours	1,767	1,713	1,738	1,834
Avg. hourly earnings	$ 4.89	$ 4.16	$ 3.46	$ 2.31
Cost of materials as a % of value of shipments	49	46	51	55
Cost of materials and payroll as a % of value of shipments	75	72	79	81
Value added per employee	$19,529	$17,192	$11,927	$ 8,597
Payroll as a % of value added	51	48	56	56
Value added per production worker hour	$ 12.73	$ 11.53	$ 7.86	$ 5.23

	Rainwear/Waterproof Outer Garments			
	1982	1980	1977	1972
Payroll per employee	$10,871	$ 9,053	$ 7,450	$ 5,610
Production workers:				
% of total employment	86	87	84	86
Annual hours	1,737	1,673	1,772	1,780
Avg. hourly earnings	$ 5.36	$ 4.85	$ 3.44	$ 2.66
Cost of materials as a % of value of shipments	46	43	45	50
Cost of materials and payroll as a % of value of shipments	68	71	71	76
Value added per employee	$26,452	$19,177	$16,200	$10,961
Payroll as a % of value added	41	47	46	51
Value added per production worker hour	$ 17.70	$ 13.21	$ 10.86	$ 7.18

NOTE: Values are in current dollars

Source: U.S. Bureau of the Census:
1982 Census of Manufactures.

Industry Location

Industry Statistics For Leading States: 1982

Industry	All Plants		Employees		Value added By Manufacture	
	Total	With 20+ Employees	No. (thous.)	% of Total	Mil. $	% of Total
Men's & boys' suits & coats						
U.S. total	528	343	75.0	100.0%	$1,681.2	100.0%
Leading states:						
Pennsylvania	95	72	16.1	21.5	380.3	22.6
New York	134	57	9.3	12.4	211.5	12.6
Massachusetts	36	25	6.3	8.4	189.0	11.2
Georgia	25	22	5.8	7.7	121.6	7.2
Ohio	8	7	2.9	3.9	119.2	7.1

(continued)

GENERAL INDUSTRY STATISTICS

Industry Location (continued)

Industry Statistics For Leading States: 1982
(continued)

	All Plants		Employees		Value added By Manufacture	
	Total	With 20+ Employees	No. (thous.)	% of Total	Mil. $	% of Total
Men's & boys' separate trousers						
U.S. total	256	268	56.9	100.0%	$1,111.2	100.0%
Leading states:						
Texas	24	22	9.0	15.8	201.9	18.2
Georgia	47	44	9.7	17.0	174.7	15.7
Tennessee	34	25	3.8	6.7	77.9	7.0
Mississippi	15	14	4.4	7.7	76.4	6.9
New York	57	25	1.7	3.0	69.5	6.3
Waterproof outergarments						
U.S. total	112	76	9.3	100.0%	$ 246.0	100.0%
Leading states:						
New York	24	16	0.6	6.5	23.3	9.5
Massachusetts	12	9	1.5	16.1	22.4	9.1
New Jersey	9	6	0.5	5.4	11.9	4.8
Georgia	6	5	0.4	4.3	7.9	3.2
Florida	5	5	0.2	2.2	5.4	2.2

Source: U.S. Bureau of the Census:
1982 Census of Manufactures.

PRODUCTION

Data on the production of men's tailored clothing and rainwear is reported in the Current Industrial Reports compiled by the U.S. Bureau of the Census. All known manufacturers in the industry, except very small producers (generally less than five employees), are surveyed for these annual reports. Figures include garments assembled abroad and shipped back to U.S. cutters under the terms of Item 807 of the Tariff Schedule.

1986 domestic production varied considerably by classification with the net result that output was relatively unchanged from 1985 (down 2.2%). One significant downturn was in production of rainwear, an area beseiged by the rising tide of inexpensive imported merchandise. Manufacturers are fighting back by turning to performance fabrics and higher price points.

PRODUCTION

Production of Men's Tailored Clothing & Rainwear, 1985, 1986
(Thousands of units)

	1986	1985	% Change 1986/85
Tailored clothing	149,661	153,039	- 2.2%
Tailored suits, incl. uniforms	10,822	10,819	+ 0.02
Trios	275	234	+ 17.5
Uniform suits	193	143	+ 35.0
Overcoats, topcoats & tailored suburban & car coats, incl. uniform	1,523	1,481	+ 2.8
Uniform coats	281	360	- 21.9
Tailored suit-type dress & sportcoats, incl. uniform	19,176	19,615	+ 0.5
Uniform coats & jackets	1,273	1,562	- 18.5
Separate vests, exc. sweater vests	724	1,007	- 28.1
Separate dress & sport trousers, incl. uniform	113,938	116,517	- 2.2
Corduroy	3,899	na	--
Uniform	6,981	5,597	+ 24.7
Raincoats, including uniform (men's & boys')	2,938	3,600	- 18.4

na not available

Explanation of Terms:

Tailored uniform suits:
Includes military, guards, band, police, fire, etc. Nontailored worktype suits, such as delivery drivers and gas station attendants are included in other categories.

Trios:
Includes tailored suits with a matching and contrasting pair of pants.

Overcoats, topcoats & tailored suburban, car & stormcoats:
Includes only tailored items including uniform, reversible, zipper-lined, fingertip, and wool water-repellent coats, excludes raincoats.

Raincoats:
Includes waterproof outercoats and water-repellent coats of cotton and man-made fibers including uniforms.

Separate vests including uniform:
Includes vests not part of suits, excludes sweater vests.

Source: U.S. Bureau of the Census:
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(86)-1
(July 1987).

PRODUCTION

By Fabric

Production of Reported Categories of Men's Tailored Wear By Fabric, Construction & Wholesale Price: 1985, 1986
(Thousands of units)

	1986	1985	% Change 1986/85
Tailored suits, including uniform	10,822	10,819	+ 0.02%
By fabric:			
All cotton & chiefly cotton	707	288	+145.5
Man-made/wool blends, chiefly man-made	4,075	3,976	+ 2.5
All man-made & chiefly man-made except man-made/wool blends	2,310	2,632	- 12.2
All wool & chiefly wool	3,284	3,356	- 2.1
All other fabric	260	338	- 23.1
Fabric, n.s.k.	186	229	- 18.7
By Wholesale price:			
Under $52.50	1,594	na	--
$52.50 - $99.99	3,385	na	--
$100.00 - $149.99	2,090	na	--
$150.00 - $199.99	2,163	na	--
$200.00 and over	897	na	--
Price n.s.k.	693	na	--
Overcoats, topcoats and tailored suburban and car coats, including uniform	1,523	1,481	+ 2.8
By fabric:			
All man-made & chiefly man-made	662	665	- 0.5
All wool & chiefly wool	607	542	+ 12.0
All other fabric	222	252	- 11.9
Fabric, n.s.k.	32	22	+ 45.4
Men's & boys' raincoats, including uniform	2,938	3,600	- 18.4
Plastic (with or without fabric trim)	1,866	1,837	+ 1.6
Rubberized and/or coated fabric			
Uncoated fabric:			
All cotton & chiefly cotton	25	27	- 7.4
All man-made & chiefly man-made	899	1,605	- 44.0
All other fabric	19	24	- 20.8
Fabric, n.s.k.	129	107	+ 20.6
Tailored suit-type dress & sport coats including uniform	19,716	19,615	+ 0.5
By fabric:			
All cotton & chiefly cotton	1,848	2,007	- 7.9
Man-made/wool blends, chiefly man-made	5,934	5,820	+ 2.0
All man-made & chiefly man-made except man-made/wool blends	5,372	5,049	+ 6.4
All wool & chiefly wool	5,593	5,819	- 3.9
All other fabric	770	725	+ 6.2
Fabric, n.s.k.	199	195	+ 2.1

(continued)

PRODUCTION

By Fabric

Production of Reported Categories of Men's Tailored Wear By Fabric, Construction & Wholesale Price: 1985, 1986

(Thousands of units)
(continued)

	1986	1985	% Change 1986/85
By wholesale price:			
Under $35.00	5,230	na	--
$35.00 - $49.99	4,522	na	--
$50.00 - $64.99	1,646	na	--
$65.00 - $79.99	2,202	na	--
$80.00 - $94.99	602	na	--
$95.00 - $109.99	1,261	na	--
$110.00 and over	1,756	na	--
Price n.s.k.	1,645	na	--
Separate vests, excluding sweater vests	724	1,007	- 28.1%
By fabric:			
All cotton & chiefly cotton	243	231	+ 5.2
All man-made & chiefly man-made	369	601	- 38.6
All wool and chiefly wool	44	101	- 56.4
All other fabric	20	22	- 9.1
All wool and chiefly wool	550	693	- 20.6
Fabric, n.s.k.	48	52	- 7.7
Separate dress & sport trousers, including uniform	113,938	116,517	- 2.2
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	16,698	15,493	+ 7.8
Man-made/wool blends, cheifly man-made	18,886	19,059	- 0.9
All man-made & chiefly man-made, except man-made/wool blends	64,195	65,876	- 2.6
All wool & chiefly wool	7,850	8,190	- 4.2
All other fabric	1,000	1,928	- 48.1
Knit fabric:			
All cotton & chiefly cotton	(D)	(D)	--
All man-made & chiefly man-made	4,504	5,123	- 12.1
All wool and chiefly wool	550	693	- 20.6
Fabric, n.s.k.	(D)	(D)	--
By wholesale price:			
Under $5.99	632	na	--
$6.00 - $9.99	16,696	na	--
$10.00 - $13.99	58,491	na	--
$14.00 - $17.99	12,513	na	--
$18.00 - $21.99	4,973	na	--
$22.00 and over	9,343	na	--
Price, n.s.k.	11,290	na	--

na not available
n.s.k. not specified by kind.
(D) Withheld to avoid disclosure of specific companies by Census Bureau.

Source: U.S. Bureau of the Census:
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(86)-1
(July 1987).

PRODUCTION

Materials Consumed in Production

Materials Consumed in Production of Men's & Boys' Tailored Clothing:
1977, 1982
(Delivered cost in millions of dollars)

	1982	1977	% Change 1982/1977
Men's & boys' suits & coats, total	$897.7	$846.8	+ 6.0%
Broadwoven fabrics	500.8	445.2	+ 12.4
Purchased knitted fabric	75.3	57.1	+ 31.9
All other materials, components, parts, containers and supplies	184.2	161.5	+ 14.1
Materials, parts, containers & supplies, n.s.k.	137.4	183.0	- 24.9
Men's & boys' separate trousers, total	695.2	658.2	+ 5.6
Broadwoven fabrics	370.9	316.5	+ 17.2
Purchased knitted fabric	119.4	94.5	+ 26.3
All other materials, components, parts, containers and supplies	126.3	111.0	+ 13.8
Materials, parts, containers & supplies, n s.k.	78.6	136.2	- 42.3
Waterproof outergarments, total	$157.1	$105.2	+ 49.3%
Broadwoven fabrics	99.8	51.6	+ 81.1
Purchased knitted fabrics		3.3	
All other materials, components, parts, containers & supplies	35.2	21.7	+ 62.2
Materials, parts, containers & supplies, n.s.k.	22.1	28.6	- 22.7

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census:
Census of Manufactures, 1982,
MC82-I-23A; MC82-I-23D.

Seasonal Patterns in Production

Men's Tailored Wear:
Percent of Years Cuttings by Month, 1985, 1986

	Suits		Overcoats & topcoats		Sport & dress coats		Sport & dress trousers	
	1986	1985	1986	1985	1986	1985	1986	1985
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	9.3	10.4	7.5	5.7	7.9	8.8	9.0	8.9
February	9.1	9.0	6.2	6.3	7.8	7.9	9.0	9.5
March	8.4	9.4	6.8	7.5	7.7	8.5	9.2	10.3
April	9.5	8.1	6.2	7.6	8.6	9.0	9.4	8.5
May	9.4	8.7	6.3	6.3	7.6	8.2	8.1	9.1
June	7.8	7.6	7.2	6.7	8.3	8.2	7.3	7.6
July	5.7	5.8	8.1	7.6	7.2	6.8	6.8	7.1
August	7.5	8.0	11.8	11.6	8.7	9.1	8.2	8.8
September	8.2	8.5	15.2	12.2	9.6	9.2	8.7	8.0
October	9.4	8.8	11.4	12.2	10.4	9.6	8.8	8.2
November	8.1	8.4	8.5	8.8	8.7	7.7	7.9	7.8
December	7.6	7.1	4.9	7.6	7.6	7.0	7.5	6.3

Source: U.S. Bureau of the Census:
Current Industrial Reports;
Men's & Boys' Outerwear, MA-23E(86)-1
(July 1987).

PRODUCT SHIPMENTS

In contrast with "industry shipments" previously covered and defined on page 3, the value of specific products shipped by all manufacturers (product shipments), regardless of industry classification, is reported by the Census Bureau.

In addition, the International Trade Administration compiles trend information on some products covering the value of shipments on a constant dollar basis, eliminating the effects of inflation.

Trends In The Constant Dollar Value Of Shipments
Of Men's & Boys' Tailored Clothing By All Producers
(Based on 1982$)

	Percent Change			
	Compound Annual		Annual	
	1972-1984	1979-1984	1984-1985	1985-1986
Suits/Coats	- 3.4%	- 1.4%	- 4.1%	- 1.2%
Trousers	- 2.8	- 0.9	- 5.2	+ 1.5

Source: International Trade Administration: 1987 U.S. Industrial Outlook.

The total value of shipments of men's tailored wear (not including rainwear) shipped by all U.S. producers was reported at $3.7 billion in 1982, based on a complete census of manufactures. This was 10.4% over the 1977 total (current dollars).

Quantity & Value of Shipments: 1982, 1977

	Quantity (thous.)		Value (mil. $)	
	1982	1977	1982	1977
Total reported	175,741	201,972	$3,738.1	$3,384.5
Men's:				
Suits	11,368	19,362	1,078.6	1,273.4
Overcoats & topcoats	2,620	5,197	126.6	179.8
Tailored dress & sport coats & jackets	19,809	19,514	944.0	623.0
Separate dress & sport trousers	141,944	157,899	1,588.9	1,308.3

Source: U.S. Bureau of the Census: 1982 Census of Manufactures, (Industry Series MC82-1-23A; D).

Current information on a quarterly and annual basis on the value of shipments of men's wear is reported by the Census Bureau in the Current Industrial Reports, described in the section on production. Small manufacturers, for which estimates are compiled by the Bureau in the complete Census of Manufactures, are not included in the CIR reports.

PRODUCT SHIPMENTS

Value of Shipments of Specified Men's Wear: 1985, 1986
(Millions of dollars)

	1986	1985	% Change 1986/85
Total, all reported tailored wear	$3,551.5	$3,449.5	+ 3.0%
Suits, including uniform	1,216.4	1,195.6	+ 1.7
Overcoats & topcoats, including uniform	96.7	96.5	+ 0.2
Tailored dress and sport coats, incl. leisure and uniform coats & vests	1,126.3	1,088.6	+ 3.4
Separate vests, excluding sweater vests	14.2	19.8	- 28.3
Rainwear, including uniform*	1,112.1	1,068.8	+ 4.1

* includes boys'

Source: U.S. Bureau of the Census:
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(86)-1.

Concentration of Product Shipments

Share of Specified Men's Suit, Coat & Rainwear Shipments
By Largest U.S. Manufacturers: 1982, 1977, 1972

	Product Shipments (mil. $)	Percent of value accounted for by the largest companies			
		Top 4	Top 8	Top 20	Top 50
Suits, incl. uniform & leisure					
1982	$1,078.6	37%	51%	74%	95%
1977	1,273.4	33	45	66	85
1972	898.5	28	42	64	83
Overcoats & tailored car coats					
1982	126.6	31	53	88	100
1977	179.8	28	46	75	97
1972	100.4	31	48	77	98
Separate dress & sport trousers*					
1982	1,588.9	30	46	67	89
1977	1,308.3	28	39	57	78
1972	1,394.1	29	41	61	81
Rainwear**					
1982	357.0	48	64	86	98
1977	313.1	34	46	68	90
1972	291.2	33	43	60	83

*includes boys'
**includes women's and children's

Source: U.S. Bureau of the Census:
1982 Census of Manufactures,
Concentration Ratios in Manufacturing.

PRODUCT SHIPMENTS

By Geographic Region

Value of Product Shipments of Tailored Wear and Rainwear By Leading State, 1982
(Millions of dollars)

	Value of Shipments
Men's suits, including leisure & uniform	
U.S. total	$1,078.6
Leading states:	
Pennsylvania	232.2
New York	161.6
Ohio	140.3
Georgia	124.0
Massachusetts	98.7
Leading states total	756.9
Percent of U.S. total	70.1%
Men's overcoats & tailored car coats	
U.S. total	$ 126.1
Leading states:	
Pennsylvania	25.9
Massachusetts	22.3
New York	21.1
Minnesota	6.2
Leading states total	75.5
Percent of U.S. total	59.6%
Men's tailored dress & sport coats & jackets	
U.S. total	$ 944.0
Leading states:	
Pennsylvania	216.1
Texas	124.2
Massachusetts	122.4
Georgia	78.6
Ohio	77.2
Maryland	76.7
Leading states total	695.2
Percent of U.S. total	73.6%
Commission work on men's & boys' suits & coats	
U.S. total	$ 493.6
Leading states:	
Pennsylvania	89.2
New York	63.4
Georgia	55.7
Tennessee	47.8
New Jersey	38.4
Leading states total	294.5
Percent of U.S. total	59.7%

(continued)

PRODUCT SHIPMENTS

By Geographic Region (continued)

Value of Product Shipments of Tailored Wear and Rainwear
By Leading State, 1982
(Millions of dollars)
(continued)

	Value of Shipments
Men's & boys' separate dress & sport trousers	
U.S. total	$1,588.9
Leading states:	
Texas	305.4
Georgia	208.8
New York	154.1
Tennessee	148.2
Missouri	83.9
Leading states total	900.4
Percent of U.S. total	56.7%
Commission work on men's & boys' dress & sport trousers	
U.S. total	$ 426.7
Leading states:	
California	70.5
Texas	69.6
Alabama	63.0
Pennsylvania	49.1
Mississippi	36.3
Leading states total	288.5
Percent of U.S. total	67.6%
Raincoats & other waterproof outerwear	
U.S. total	$ 357.0
Leading states:	
Maryland	133.9
New York	53.7
Massachusetts	24.2
Florida	8.3
California	2.5
Leading states total	222.6
Percent of U.S. total	62.4%

Source: U.S. Bureau of the Census: 1982 Census of Manufactures, MC82-I-23A.

PRODUCER PRICE TRENDS

Some dramatic increases in the price of wool fabrics may be in the offing for Fall 1988, leading to higher prices for men's tailored clothing made of wool. This expected price increase comes in the wake of a skyrocketing raw wool market in Australia, the world's largest producer and exporter of apparel wool fibers. It supplies 28% of the world's supply, so that when the price rises, in this case from soaring demands from Japan, China and the Soviet Union, prices in the global marketplace rise accordingly. Since raw materials may constitute half the cost of fabrics, this increase will have to be passed along to U.S. manufacturers.

Producer Price Indexes for Selected Types of Men's Tailored Wear

	August Averages			Annual Averages		
	1987	1986	% Change 1987/86	1986	1985	% Change 1986/85
All apparel (12/84=100)	104.2	102.1	+ 2.1%	102.3	101.1	+ 1.2%
Men's & boys' suits and coats (12/80=100)	125.5	120.1	+ 4.5	121.6	119.9	+ 1.4
Men's business suits (12/80=100)	127.3	118.5	+ 7.4	121.0	118.8	+ 1.9
Regular weight business suits (12/80=100)	126.9	116.2	+ 9.2	119.8	118.2	+ 1.4
Light weight business suits (12/80=100)	128.4	na	--	123.9	120.1	+ 3.2
Men's tailored dress and sport coats and jackets (12/80=100)	122.5	121.2	+ 1.1	120.9	118.7	+ 1.9
Men's and boy's separate trousers (12/81=100)	109.8	107.5	+ 2.1	106.8	103.7	+ 3.0
Men's dress and sport trousers, except uniform (12/81=100)	111.7	108.9	+ 2.6	108.1	104.0	+ 3.9
All wool and wool blends (12/81=100)	102.7	108.7	- 5.5	108.2	106.4	+ 1.7
All cotton and cotton blends (12/81=100)	109.8	104.9	+ 4.7	103.2	97.1	+ 6.3
Waterproof outer garments (6/85=100)	101.2	100.0	+ 1.2	100.5	na	--
Men's and boys' raincoats and raincapes (6/85=100)	102.2	100.0	+ 2.2	100.4	na	--

na not available

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Preliminary data for the first seven months of 1987 shows a significant increase in U.S. imports of men's & boys' suits from the comparable 1986 period. For the January-July period, imports were up 24.4% in quantity and 22.1% in value from the prior year.

Italy was the largest importer of suits to the U.S. in value over this period, followed by Korea. Korea was the largest importer in terms of quantity. Italian imports grew 28.5% in value and 6.6% in quantity when compared with January-July 1986. Korean imports were up 12.7% and 13.0%, respectively.

The biggest gains were in Taiwanese imports, more than doubling in both value and quantity-up 109% and 102%, respectively. Taiwan has also made a major dent in the U.S. rainwear market with inexpensive merchandise that is causing domestic manufacturers problems.

U.S. Imports & Exports of Men's & Boys' Tailored Clothing
(Quantity in thous. of dozens; value in millions of dollars)

	January-March Total			Annual Total		
	1987	1986	% Change 1987/86	1986	1985	% Change 1986/85
Suits, coats & jackets						
Imports:						
Quantity	1,334	1,284	+ 3.9%	6,195	6,039	+ 2.6%
Value*	$229,858	$204,047	+12.6	$1,034,914	$1,017,933	+ 1.7
Exports:						
Quantity	280	226	+23.9	934	765	+22.1
Value	$ 11,594	$ 9,263	+25.2	$ 36,801	$ 32,608	+12.9
Trousers, slacks & shorts						
Imports:						
Quantity	7,061	5,575	+26.7%	17,876	14,549	+22.9%
Value*	$393,032	$288,679	+36.1	$1,053,189	$ 884,448	+19.1
Exports:						
Quantity	1,090	751	+45.1	3,507	2,629	+33.4
Value	$ 33,562	$ 18,705	+79.4	$ 104,850	$ 75,698	+38.5

*Import value is Customs value, defined as the price actually paid or payable for merchandise when sold for exportation to the United States, excluding U.S. import duties, freight, insurance and other charges incurred in bringing the merchandise to the U.S.

Source: U.S. Industrial Trade Commission (USITC):
U.S. Trade Shifts in Selected Commodity Areas
(USITC Publication 2002).

TOTAL DOMESTIC SUPPLY

Shipments, Exports, Imports & Apparent Consumption Of Reported Types of Tailored Clothing (Men's & Boys'): 1985, 1986

(Quantity in thousands of dozens; value in millions of dollars)

	Suits		Suit-type Dress and Sport Coats		Trousers, Slacks and Shorts#	
	Quantity	Value	Quantity	Value	Quantity	Value
1986						
Manufacturers shipments*	1,101	$1,278.9	1,738	$1,138.8	47,436	$5,477.6
Exports of domestic mdse.**	10	1.2	54	4.8	2,948	86.8
"807" imports						
Quantity	21	--	184	--	4,217	--
Value: U.S. content	--	0.5	--	19.6	--	181.0
Total value, c.i.f.***	--	5.6	--	31.9	--	249.7
Total imports for consumption						
Quantity	373	--	851	--	17,023	--
Value (c.i.f.)	--	280.9	--	244.7	--	1,288.1
Net new domestic supply	1,464	1,558.6	2,535	1,378.7	61,511	6,678.9
Imports: % of supply	25.5%	18.0%	33.6%	17.7%	27.7%	19.3%
1985						
Manufacturers shipments*	1,108	$1,262.5	1,722	$1,096.3	43,564	$5,040.1
Exports of domestic mdse.**	25	2.0	51	4.9	2,302	63.7
"807" imports						
Quantity	20	--	179	--	2,889	--
Value: U.S. content	--	0.3	--	16.6	--	127.3
Total value, c.i.f.***	--	5.8	--	33.7	--	174.3
Total imports for consumption						
Quantity	441	--	814	--	14,022	--
Value (c.i.f.)	--	287.3	--	254.4	--	1,120.2
Net new domestic supply	1,524	1,547.8	2,485	1,345.8	55,284	6,096.6
Imports: % of supply	28.9%	18.6%	32.8%	18.9%	25.4%	18.4%

# includes jeans
* Value of manufacturers shipments is f.o.b. plant
** Value of exports is value at port
*** C.I.F. value includes cost, insurance and freight to port of entry--duty is not included.

Source: U.S. Bureau of the Census: _Current Industrial Reports_ (MA23F(86)-1).

THE POTENTIAL MARKET

Population

The fastest growing segment of the male population between the years 1987 and 2005 will be the 35-54 year old bracket. This growth, which reflects the aging of the baby boom generation, will push the number of males in this segment to 40.8 million, accounting for more than 30% of the total male population. The second fastest growing age group will be the 55-64 year old bracket, a group expected to grow almost 34% over the period. These two groups, taken together, have a great deal of discretionary income and will be in their prime earning years, a fact that reflects well for the men's furnishings industry.

Estimated Male Population of the U.S., 1987, and Projections*, 1994, 2005

	Number (thousands)			% Change	Percent Distribution		
	1987	1994	2005	2005/1987	1987	1994	2005
Total, all ages	118,309	125,464	134,297	+ 13.5%	100.0%	100.0%	100.0%
Under 16 years	28,608	30,746	29,723	+ 3.9	24.2	24.5	22.1
16 years & older	89,701	94,718	104,574	+ 16.6	75.8	75.4	77.9
16 - 19	7,546	6,712	8,058	+ 6.8	6.4	5.3	6.0
20 - 34	31,767	29,725	27,416	- 13.7	26.9	23.7	20.4
35 - 54	28,239	35,187	40,769	+ 44.4	23.9	28.0	30.4
55 - 64	10,178	9,793	14,060	+ 38.1	8.6	7.8	10.5
65 & older	11,971	13,300	14,271	+ 19.2	10.1	10.6	10.6
Median age	30.8	33.0	36.0	+ 16.9	--	--	--

* Middle series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census:
Current Population Reports,
(Series P-25, No. 952).

Employment

The dominant and continuing role of the suit as a major part of corporate conformity makes the industry dependent on future trends in white collar employment. The shift nationwide from manufacturing to service industries augurs well for the suit business but problems loom. For one, many corporations have moved their operations from urban to suburban locales, where some permit less formal dress codes for their employees. In addition, tailored clothing manufacturers have to contend with the baby boomer generation entering the workforce, many of whom are far more comfortable in sportswear and more resistant to corporate dress styles, preferring to wear sport coats rather than suits.

THE POTENTIAL MARKET

Employment (continued)

Number of Males in Managerial/Professional Occupations: 1983, 1986
(In thousands)

	1986	1983	% Change 1986/83
Managerial & professional specialty	15,030	13,943	+ 7.7%
Executive, administrative and managerial	7,990	7,282	+ 9.7
Officials, administrators, public administration	271	256	+ 5.9
Financial managers	252	219	+15.1
Personnel and labor relations managers	58	59	- 1.6
Purchasing managers	71	63	+12.7
Managers, marketing, advertising, public relations	330	310	+ 6.5
Administrators, education and related fields	262	243	+ 7.8
Managers, medicine & health	48	39	+23.1
Managers, properties & real estate	202	174	+16.1
Management-related occupations	1,852	1,771	+ 4.6
Professional specialty	7,039	6,654	+ 5.8
Architects	119	90	+32.2
Engineers	1,644	1,481	+11.0
Mathematical & computer scientists	403	326	+23.6
Natural scientists	95	84	+13.1
Health diagnosing occupations	619	637	- 2.8
Health assessment and treating occupations	298	270	+10.4
Teachers, total	1,356	1,365	- 0.7
Counsellors, educational & vocational	80	86	- 7.0
Librarians, archivists & curators	36	33	+ 9.1
Lawyers & judges	532	548	- 2.9
Other	1,857	1,734	+ 7.1

Source: U.S. Bureau of Labor Statistics:
Employment & Earnings.

Male Civilian Labor Force By Age: 1986 & Projections to 1995

	Labor Force (thous.)		% Change	Participation Rate	
	1986	1995	1995/86	1986	1995
Males, total	65,422	69,282	+ 5.9%	76.3%	75.3%
By age:					
16 to 19 years	4,102	3,750	- 8.9	56.4	57.9
20 to 24 years	8,148	6,790	-16.7	85.8	87.3
25 to 34 years	19,383	18,247	- 5.9	94.6	93.7
35 to 44 years	15,029	19,232	+28.0	94.8	94.3
45 to 54 years	9,994	13,721	+37.2	91.0	90.4
55 to 64 years	6,954	6,119	-12.0	67.3	62.6
65 years & over	1,811	1,423	-21.4	16.0	11.0

Source: U.S. Bureau of Labor Statistics:
Monthly Labor Review (Nov. 1985),
Employment & Earnings (January 1987).

RETAIL SALES

Retail sales of men's suits totaled $2.5 billion in 1986, an 8.7% recovery from 1985 after several years of decline, according to the Kurt Salmon/National Panel Diary Purchase Report for 1986. Sales of blazers and sportcoats reached $1.6 billion, an annual gain of 5.0%. Shifts in unit purchases over the last four years for all men's wear, and tailored clothing specifically, are shown below.

Retail sales of men's rainwear are estimated at about $265 million for 1986, down almost 9% compared with 1985.

Year-to-Year Changes in Purchases of Specified Men's Wear, 1983-1987
(% change in units)

	Projected 1987/1986	Actual 1986/1985(r)	Actual 1985/1984	Actual 1984/1983
Men's wear, total	+ 2%	+ 3%	0	- 2%
Tailored clothing (suits, slacks, jackets, topcoats, etc.)	+ 8	+ 6	-15%	+ 5

(r) revised

Source: Kurt Salmon Associates: Softgoods Outlook for 1987
KSA/NPD Quarterly (March 1987). Based on the KSA/NPD purchase panel of 19,500 households.

The value at retail for all men's suits, coats, sportcoats and jackets totaled an estimated $10.7 billion in 1986, based on U.S. Bureau of Economic Analysis and U.S. Bureau of Labor Statistics data detailing personal consumption expenditures. This covers the retail value of products reaching consumers through a variety of channels, primarily through retail outlets but also through direct sales by manufacturers and other means. 1985 spending was an estimated $10.0 billion.

RETAIL SALES BY TYPE OF OUTLET

Data on sales of men's tailored wear purchased in major retail outlet types was developed by the U.S. Bureau of the Census in its complete Census of Retail Trade. This census, compiled every five years (most recently in 1982), is the only official data on merchandise line sales by type of retail outlet.

Information on total sales of men's and boys' wear in all retail outlets which have a payroll is included in the published census reports. Information on sales of specific types of men's wear is limited to department stores, men's wear stores and family clothing stores. However, these are the major outlets --accounting for over 85% of total men's and boys' wear sales in all types of retail outlets with payroll in 1982.

RETAIL SALES BY TYPE OF OUTLET

Total sales of men's tailored and casual wear (as classified by the Census Bureau) in the three major outlet types amounted to $10.3 billion in 1982 and represented 41.2% of total men's and boys' wear business in these three outlet types.

Men's Tailored Clothing/Casual Wear in Leading Outlet Types, 1982
(Includes only stores with payroll)

	Overcoats, Topcoats, Raincoats*				Suits & Formal Wear			
	Stores***		Sales		Stores***		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Reported total	30,070	100.0	$1,750.3	100.0	22,050	100.0	$2,342.5	100.0
Department stores	6,446	21.4	773.9	44.2	3,816	17.3	542.0	23.1
Men's wear stores	13,124	43.6	579.1	33.1	11,638	52.8	1,489.1	63.6
Family clothing stores	10,500	35.0	397.3	22.7	6,596	29.9	311.4	13.3

	Sportcoats/Blazers				Dress/Casual Slacks & Jeans**			
	Stores***		Sales		Stores***		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Reported total	23,843	100.0	$1,577.4	100.0	38,266	100.0	$4,672.9	100.0
Department stores	4,606	18.5	531.7	33.7	8,419	22.0	1,751.7	37.5
Men's wear stores	12,164	49.0	809.8	51.3	15,038	39.3	1,417.3	30.3
Family clothing stores	8,073	32.5	235.9	15.0	14,809	38.7	1,503.9	32.3

Contribution to Total Sales of All Men's & Boys' Wear in Reported Retail Outlet Types

	Total Men's & Boys' Wear Sales	Men's Tailored/Casual Wear Sales	
	Mil. $	Mil. $	% of Total Men's & Boys' Wear Sales
Reported total	$25,117.9	$10,343.1	41.2%
Department stores	12,812.0	3,599.3	28.1
Men's wear stoers	7,052.6	4,295.3	55.0
Family clothing stores	5,253.3	2,448.5	41.0

* Outer jackets are also included in this classification.
** Walking shorts are also included.
*** Each store location is separately counted, not just headquarter store locations. Leased departments are not included in the stores in which operated, but are treated as separate establishments in the pertinent kind-of-business classification.

Source: Based on U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY STORE TYPE

Department Stores

Reports on merchandise line sales in department stores have been made available in reports covering the complete 1982 Census of Retail Trade, compiled by the U.S. Census Bureau. Under the Standard Industrial Classification system followed in government reports, department stores include all outlets meeting the definition by store size and merchandise handled, including discount department stores as well as traditional department stores, and the department store operations of such national chains as Sears Roebuck and Montgomery Ward.

The Census of Retail Trade does not include a breakdown on how much tailored wear business was done by each of these department store operations in 1982. However, there is a breakdown on total store sales for the year: conventional accounted for 32.0%; discount/mass merchandisers, 39.1%; national chains, 38.9%. The mass merchandiser/discounter department stores (which represented 76% of all department store establishments and 68% of department store sales in 1982) have increased their share since the census was compiled.

The number of department stores reporting sales of the specified types of men's tailored/casual wear and the sales of this merchandise in 1982 are shown in the table below.

Men's Tailored/Casual Wear Sales in Department Stores, 1982

	No. of Stores Reporting Sales	Men's Tailored/Casual Wear Sales		
			% of Total Store Sales	
		Thous. $	Stores Handling Line	All Dept. Stores
Reported total	--	$3,599,284	4.8%	3.6%
Men's				
Overcoats/topcoats*	6,446	773,908	1.0	0.8
Suits & formal wear	3,816	541,974	1.0	0.5
Sportcoats & blazers	4,606	531,700	0.8	0.5
Dress & casual slacks, jeans, walking shorts	8,419	1,751,702	2.0	1.8

* Includes raincoats and outer jackets.

Source: U.S. Bureau of the Census:
1982 Census of Retail Trade RC82-1-3.

The men's tailored clothing business produces low gross margins for department stores, among the lowest of all men's apparel classifications. Promotions are still the primary tool used by department stores to pull in suit customers with many stores selling more than half their suits off-price. Tailored clothing is a traffic-builder for the stores, providing customers for their shoe and shirt departments. This helps offset the costs of selling tailored clothing, including a staff of tailors, commissioned salespeople and large, slow-turning inventories.

Department Stores (continued)

Department store are trying to boost their margins in tailored clothing by cutting back on promotions, though many have found them inevitable. They are bringing in stronger assortments of upper-priced goods that are generally not available at competing off-price, mass merchant and discount outlets. Others are cutting back on the number of resources they work with, hoping to get better prices from the ones they keep.

Specialty Stores

Men's specialty stores, such as Saks Fifth Avenue, remain in men's tailored clothing in a big way, enjoying a surge of interest from younger customers. Though some business may have been lost to off-prices, specialty stores still place a premium on their profitable better business, unlike department stores which use better business as a means to obtaining profit in furnishings and sportswear.

At Saks Fifth Avenue, nearly 100% of its merchandise was private label, until about 15 years ago when many designer names were brought in. Private label never dropped below 50% and is now growing back toward its peak. It sees the main competition coming from free-standing specialists like Louis of Boston or Paul Stuart and from specialty store chains such as Mark Shale.

Men's Tailored/Casual Wear Sales in Specialty Stores, 1982

	No. of Stores Reporting Sales	Men's Tailored/Casual Wear Sales		
			% of Total Store Sales	
		Thous. $	Stores Handling Line	All Specialty Stores
MEN'S WEAR STORES				
Reported total	--	$4,295,166	34.3%	55.6%
Men's				
Overcoats, topcoats, raincoats*	13,124	579,066	9.4	7.5
Suits & formal wear	11,638	1,489,066	26.0	19.3
Sportcoats & blazers	12,164	809,768	13.7	10.5
Dress & casual slacks, jeans, walking shorts	15,038	1,417,266	20.6	18.3
FAMILY CLOTHING STORES				
Reported total	--	$2,448,483	25.2%	18.3
Men's				
Overcoats, topcoats, raincoats*	10,500	397,329	4.3	3.0
Suits & formal wear	6,596	311,368	5.0	2.3
Sportcoats & blazers	8,073	235,859	3.2	1.8
Dress & casual slacks, jeans, walking shorts	14,809	1,503,927	12.7	11.2

* Also includes outer jackets for men.

Source: U.S. Bureau of the Census:
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY STORE TYPE

Specialty Stores (continued)

Selected Merchandising & Operating Results in Men's Wear Stores: 1986
(Median results)

	Men's				
	Tailored Clothing	Suits	Coats	Sport Coats	Dress Slacks
Percent change in sales from last year (75)*	+ 1.6%	+ 3.3%	- 1.8%	+ 2.4%	+ 1.0%
Percent of total store sales (85)*	41.3	17.7	2.0	11.7	8.8
Percent of men's tailored wear sales (84)*	100.0	44.3	5.6	30.2	21.5
Percent distribution of average inventory in men's tailored clothing dept. (52)*	100.0	45.6	5.2	31.7	16.2
Markdowns, % of men's tailored clothing sales (66)*	16.8	16.5	15.5	15.5	13.3
Number of stock turns (54)*	1.3	1.4	1.4	1.4	1.7

* Number of reporting firms in each category.

Source: Menswear Retailers of America,
1987 Annual Business Survey.

RETAIL SALES BY AREA

Listed below are the ten leading metropolitan markets based on men's and boys' clothing sales in 1986. Led by the New York market, the top ten account for nearly one quarter of total U.S. sales. Data from Sales & Marketing Management's "Survey of Buying Power" (1987 Edition) shows that the top 50 markets do 54.7% of all men's & boys wear business, the top 100 account for 68.7% and the top 150 do 76%.

The Top Ten Metropolitan Markets For Sales of
All Men's & Boys' Wear, 1986

1.	New York, N.Y.	$1,959.6
2.	Los Angeles/Long Beach, Cal.	1,661.3
3.	Chicago, Ill.	1,356.4
4.	Boston/Lawrence/Salem, Mass.	953.3
5.	Philadelphia, Pa.	926.5
6.	Washington, D.C.	771.3
7.	Detroit, Mich.	763.1
8.	Nassau/Suffolk, N.Y.	709.2
9.	Houston, Tex.	645.4
10.	Atlanta, Ga.	521.3
	Top Ten Metropolitan Markets, total (24% of U.S. total)	$10,267.4

Source: Based on Sales & Marketing Management,
"Survey of Buying Power," 1987 Edition
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RETAIL ADVERTISING

Percent of Year's Total Newspaper Advertising Linage For Specified Men's Merchandise By Month, 1986

	Suits	Sportcoats	Slacks
Total	100.0%	100.0%	100.0%
January	4.9	4.9	3.3
February	7.4	5.1	6.3
March	14.1	11.5	8.9
April	9.2	5.5	7.6
May	8.7	4.3	6.4
June	7.6	12.1	13.8
July	4.3	2.5	6.2
August	5.7	6.4	12.3
September	8.5	8.6	7.5
October	14.3	11.6	7.5
November	8.0	14.8	9.0
December	7.3	12.7	11.2

Source: Advertising Checking Bureau, 1986 (1988 Newspaper Advertising Planbook).

Percent of Newspaper Advertising For Specified Men's Merchandise By Price Range, 1987

Suits		Slacks	
Price of Product	% of Advertising	Price of Product	% of Advertising
To $75	9.2%	To $15	28.5%
$85.01 - $100	20.2	$15.01 - $20	32.5
$100.01 - $150	23.1	$20.01 - $25	16.7
$150.01 - $200	16.0	$25.01 - $30	8.1
$200.00 - $250	11.1	$30.01 - $35	4.3
Over $250	12.1	Over $35	7.4
Unpriced	8.3	Unpriced	2.5

Source: Advertising Checking Bureau, 1987 (1988 Newspaper Advertising Planbook).

CONSUMER PRICE TRENDS

Preliminary September 1987 figures on men's wear prices show that coats, jackets, sport coats and suits rose 3.4% from August levels. Retail prices for all men's and boys' apparel increased 2.1% for the month. Compared with year ago figures, the coat and suit prices were up 2.8% while the total men's wear prices were up 2.6%.

CONSUMER PRICE TRENDS

A Labor Department official attributed the apparel price increases from August to September to the introduction of winter fashions. In contrast to the moderate rise in men's coat, jacket, sportcoat and suit prices, comparable products for women rose 10.6% for the month.

Consumer Price Indexes For Selected Men's Apparel Items

	Annual Averages			% Change
	1986	1985	1984	1986/85
All items (1967=100)	328.4	322.2	311.1	+ 1.9%
All apparel, less footwear (1967=100)	188.3	188.1	183.2	+ 0.4
Men's wear (12/77=100)	126.3	124.7	121.1	+ 1.3
Suits, sportscoats, coats and jackets (12/77=100)	120.1	115.5	112.8	+ 4.0

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING PRACTICES

Average Purchase Rate For Men's Suit & Coat Products
(Units Per 1,000 Households)

	Suits/Sportscoats	Coats/Raincoats
Average Month	38.4	59.8
January	42.0	61.9
February	43.7	43.9
March	41.3	55.0
April	30.7	37.9
May	34.7	27.1
June	39.7	28.1
July	23.7	19.4
August	28.8	29.8
September	31.9	52.4
October	32.1	73.9
November	42.7	112.7
December	70.1	176.0

Source: 1987 Newspaper Advertising Planbook.

Recent focus groups sponsored by the Clothing Manufacturing Association on suit purchases (Daily News Record, November 10-11 1987) showed that most men rarely make the buying decision on their own, relying on wives and girlfriends for affirmation. This held true for both older men established in business earning an average $56,000 a year and a young group representing the baby boom generation with an average income of $35,000.

CONSUMER BUYING PRACTICES

A study by MRCA Information Services shows that women buy about two-thirds of all men's wear, particularly undershorts, socks and knit sport shirts. Most big-ticket items such as suits and shoes, are bought by men but, as focus groups have shown, the influence of women in the purchasing decision is significant even when the man does the actual buying.

Percent of Men's Wear Dollars Spent By Men

	1986	1982
Men's apparel, total	42%	44%
Suits	80	75
Dress shirts	41	41

Source: MRCA Information Services.

The following information on purchases of men's tailored clothing for men aged 17 years and older for the years 1986 and 1985 has been supplied by KSA/NPD Purchase Panel, a joint venture of Kurt Salmon Associates and the NPD Group. The information is based on the findings from an on-going monthly panel tracking the purchases of 11,500 nationally representative families.

Suits

Percent of Men's Suit Purchases By Outlet

	1986		1985	
	Units	Dollars	Units	Dollars
Total purchases	100%	100%	100%	100%
Men's specialty stores	43.6	55.6	44.5	35.9
Department stores	19.2	18.1	23.6	23.9
National chains	22.4	15.3	19.7	25.2
Discount stores, incl. K mart	8.3	5.3	6.8	7.5
All other outlets	6.5	5.7	5.4	7.5

Percent of Men's Suit Purchases By Price Point

	1986		1985	
	Units	Dollars	Units	Dollars
Total purchases	100%	100%	100%	100%
Less than $60	16.7	5.2	19.3	6.5
$60.00 - $79.99	11.5	6.2	13.6	8.0
$80.00 - $99.99	13.8	9.7	12.0	8.9
$100.00 - $139.99	22.2	20.0	21.2	20.8
$140.00 - $199.99	21.1	26.4	20.9	28.4
$200.00 & over	14.7	32.5	13.0	27.4

CONSUMER BUYING PRACTICES

Suits (continued)

Percent of Men's Suit Purchases By Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units													
1986	7.8	7.3	11.5	6.9	10.3	10.3	9.1	8.4	7.4	5.9	8.6	6.5	100%
1985	8.3	7.2	11.5	10.1	9.1	8.0	10.1	6.3	8.2	8.0	6.6	5.7	100%
Dollars													
1986	8.3	6.6	11.0	6.1	10.2	10.2	10.9	9.6	6.6	5.8	8.4	6.3	100%
1985	8.8	7.0	10.7	9.1	9.7	8.6	8.9	6.4	8.7	9.2	5.8	7.1	100%

Percent of Men's Suit Purchases By Type of Fabric

	1986		1985	
	Units	Dollars	Units	Dollars
Total purchases	100%	100%	100%	100%
Polyester & polyester blends	63.8	50.9	68.9	59.8
Wool & wool blends	33.1	47.6	27.4	37.7
Cotton & cotton blends	2.4	1.0	0.9	0.3
All other materials	0.7	0.5	2.8	2.2

Source for preceding tables: KSA/NPD Purchase Panel.

Sportscoats

Percent of Men's Sportscoat Purchases By Outlet

	1986		1985	
	Units	Dollars	Units	Dollars
Total purchases	100%	100%	100%	100%
Men's specialty stores	27.0	36.4	25.7	35.0
Department stores	29.7	29.7	32.2	33.1
National chains	24.6	19.6	26.5	20.8
Discount stores, incl. K mart	10.8	7.0	9.9	6.6
All other outlets	7.9	7.3	5.7	4.5

Percent of Men's Sportcoat Purchases By Price Point

	1986		1985	
	Units	Dollars	Units	Dollars
Total purchases	100%	100%	100%	100%
Less than $40	28.4	12.1	19.9	7.9
$40.00 - $59.99	28.4	21.9	27.1	19.0
$60.00 - $79.99	18.3	19.6	25.9	24.9
$80.00 - $119.99	14.9	21.3	15.7	20.8
$120.00 & over	10.0	25.1	11.4	27.4

CONSUMER BUYING PRACTICES

Sportcoats (continued)

Percent of Men's Sportcoat Purchases By Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units													
1986	8.9	9.2	8.7	8.0	7.5	8.9	5.8	6.1	6.4	7.0	12.3	11.2	100%
1985	9.6	7.6	6.1	6.9	9.7	6.9	6.2	5.6	6.8	10.1	10.2	14.1	100%
Dollars													
1986	8.1	7.6	8.4	9.6	7.9	10.5	6.2	5.4	5.8	7.2	13.3	10.0	100%
1985	11.1	8.3	5.5	6.8	9.3	8.5	6.1	3.9	6.0	11.8	9.3	13.4	100%

Percent of Men's Sportcoat Purchases By Type of Fabric

	1986		1985	
	Units	Dollars	Units	Dollars
Total purchases	100%	100%	100%	100%
Polyester & polyester blends	44.1	39.1	47.5	41.2
Wool & wool blends	34.2	42.7	34.5	40.4
Cotton & cotton blends	13.9	7.4	9.8	6.0
All other materials	7.8	10.8	8.2	12.4

Source for preceding tables: KSA/NPD Purchase Panel.

SCHEDULE OF ADDITIONAL FACT FILES

THE CHILDREN'S MARKET: INFANTS', TODDLERS', GIRLS' AND BOYS' (APPAREL, PLAYTHINGS & RELATED PRODUCTS: Includes a detailed statistical profile of the U.S. industry, i.e. number and size of manufacturers, production and shipments, employment trends and more. Also details imports and exports by product. At the retail level, this Fact File covers sales estimates, information on leading outlet types and on consumer price trends. The size of the growing potential market in terms of population counts and birth projections is outlined as well as consumer preferences and buying patterns in the consumer market.

CONSUMER MARKET DEVELOPMENTS: An overview of all facets of the consumer market. Within the framework of population and income groups, the markets for children's products, for young adults and for the mature are defined in terms of numbers and buying power. Trends and projections are included as well as an analysis of developments that are shaping the U.S. consumer market -- living arrangements, households, working women, marriage and birth rates, etc. Trends in personal consumption expenditures are also covered.

DEPARTMENT STORE AND SPECIALTY STORE SALES (1987 Edition): Updates information in the 1986 Edition on department and apparel specialty store sales (not including discount operation) for stores (buying headquarter locations) listed by state within the four major geographical regions of the U.S. Information on the number of stores in operation is included, as well as on plans to open stores, if available. Available data on sales of branch stores is included. Additional features include: An alphabetical listing of major national chains in the general merchandise and apparel store classifications with the latest available sales figures; a listing and sales figures for traditional department stores which have sales volumes published, or estimated, of $50 million or more in 1986; a list of conglomerates operating traditional department and apparel stores, including the names and locations of these stores.

DRESSES & CAREER APPAREL (WOMEN'S, MISSES' AND JUNIORS'): At the manufacturer level, provides a statistical profile of the dress industry and the products made within this industry, including dresses, career apparel, pants dresses, ensembles, etc. Includes number and size of manufacturers, production and value of shipments, industry location and trends in employment levels. Analyzed is the growing impact of imports on total growth in the size of the consumer market, based on population counts, working women by type of occupation, and more.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Covers developments in the U.S. industry, in imports and in retail sales for fashion accessories, including small leather goods, handbags, millinery, scarves, gloves, belts, jewelry, sunglasses, watches, etc. to the extent that statistical information is available. Included are production and shipments by U.S. manufacturers plus the quantity and value of imports in recent periods. Retail sales and operating results in department and specialty stores are reported, as well as summaries of available studies on consumer buying preferences.

FOOTWEAR (MEN'S, WOMEN'S, BOYS', GIRLS') (1987 Edition): Updates the 1986 edition with figures on U.S. manufacturers production and shipments by type of footwear. Also detailed statistics on imports and their impact on total U.S. market supply. Analyses industry trends and performance of major resources and retailers. Spotlights developments in the athletic footwear industry and consumer market. At the retail level, information is included on sales trends and merchandising results for shoe stores and for footwear departments in department stores; as well as consumer purchase patterns.

HOME TEXTILES & RELATED PRODUCTS: Includes the latest statistics on the U.S. industry, including manufacturers wide variety of products -- bed linens, towels, blankets, comforters, slip covers, pillows, curtains/draperies and hardware, shades, and blinds. Covers the changing competitive nature of the industry through acquisitions of major producers and through consolidation of buying power at the retail level. Includes information on production, shipments and retail sales.

HOSIERY/LEGWEAR/BODYWEAR (MEN'S, WOMEN'S, BOYS', GIRLS'): A comprehensive report on mills making hosiery and related products, including production and shipments, fiber consumption, producer price trends. The growing trend in imports is also covered. At the consumer level, the size of the potential market is measured in terms of population counts and projections and estimates are included on retail sales of major products by type of retail outlet.

HOUSEHOLD APPLIANCES, ELECTRIC HOUSEWARES, HOME ENTERTAINMENT PRODUCTS: Covers a broad range of products included in these three classifications at the manufacturer and at the retail level. Provides a statistical profile of the U.S. industry in terms of number of manufacturers, production, shipments, exports. Imports are detailed, as well as information on export markets. Covers retail sales and merchandising results and information on appliance/radio/TV stores.

HOUSEHOLD FURNITURE AND BEDDING: Provides an overall view of market trends in the U.S. For the U.S. industry, the report covers statistics on manufacturers, on production and shipments in terms of quantity and value by type of furniture. Trends in the concentration levels in the U.S. industry are reported, as well as in employment and earnings in the industry. Also included is information on the industry in leading states. Consumer market information includes data on characteristics of new housing units (number of rooms); also trends in consumer expenditures for furniture, sales by type of outlet. Details on furniture stores, including the 25 leaders, are also covered.

MEN'S FURNISHINGS AND WORK/CAREER APPAREL: Provides a summary of major market trends in men's shirts, (dress and sport), underwear, nightwear, robes, hosiery and headwear, as well as the growing market for work/career apparel. These products are covered at the U.S. industry level, including production and shipments, employment trends and manufacturer concentration levels. Imports are detailed by product in terms of quantity and value, as well as exports. Data at the retail level includes sales and operating results in men's furnishings in department and specialty stores. The potential market for work/career apparel is defined in data on trends in employment of men by occupation.

MEN'S SPORTSWEAR, CASUALWEAR, OUTERWEAR: The wide variety of men's wear items included are covered from available statistical information on the industry at the manufacturer, retailer and consumer levels. Included is information on production and shipments by domestic producers, imports and exports. The retail market is covered in sales estimates and data on major outlet types, as well as studies of consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES; RAINWEAR: Covers information on the fast-growing category, tailored (but unstructured) separates for men, as well as suits, jackets and coats made in the men's clothing industry, plus rainwear. U.S. industry data includes trends in the number of manufacturers, production and value of shipments, location of the industry and employment trends. Foreign trade is examined, including export and import developments. The U.S. consumer market is defined in terms of number in the population by age and by population groups. A look is taken at the Young Men's market and merchandising practices of stores to reach this market. Departmental merchandising and operating results in department stores and in men's wear stores are covered.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS (A Fact File Special Edition): Covers details on U.S. manufacturers in the sporting goods/athletic goods industry, concentrating on products sold through retail outlets such as sporting goods stores and general merchandise stores, as well as functional athletic footwear and apparel. Includes quantity and value of shipments of specific products; concentration of shipments among leading manufacturers, and trends in producer prices. Imports of specified sporting and athletic goods are covered. At the consumer level, data includes statistics on sports participation levels and purchases of specific sports equipment. Also buying habits in relation to activewear and sports equipment.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING (A Fact File Special Edition): A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Percentage distributions have been calculated for firms and outlet types, including single and multi-unit operations, sales concentration and geographical distribution, with comparisons with 1977 census findings where possible.

TABLETOP & GIFTWARES: Statistics included for these industries include those on both the manufacturing and retailing levels. There's coverage of production and shipments; foreign trade; retail sales; plus data on the consumer market including buying habits and expenditures.

THE TEXTILE/APPAREL INDUSTRIES: Provides an overview of the U.S. textile and apparel industries, their current problems and programs to improve their competitive position in the U.S. market and abroad. Covers a statistical profile of each industry in terms of number of manufacturers, concentration levels, production and shipments, including exports. Trends in imports in terms of quantity and value are detailed. Also included is information on plant and equipment expenditures and on mill machinery in place in U.S. mills.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry, leading manufacturers, sales of products for both men and women, trends in industry employment and earnings, advertising expenditures, foreign trade. Consumer expenditures by product are detailed, as well as retail sales by outlet type, and consumer buying patterns and usage in regard to specific products.

WOMEN'S COATS, SUITS, RAINWEAR, AND FURS: Data from the domestic industry includes the number of manufacturers, industry concentration levels, trends in employment and earnings, production and value of shipments, including exports. Import trends and impact on U.S. market supply are analyzed. At the retail level, information includes consumer price trends, the size of the potential market and outlook for growth in terms of population by age group and employment trends among women. Also covers sales estimates and operating results in department and specialty store.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR: An analysis of statistical information available on the industry and market, from manufacturer through to consumer. Includes the latest available data on U.S. production, shipments and exports; and details on imports. Retail sales and operating results in department and specialty stores are covered, as well as trends in producer and consumer prices. Developments in the size of the consumer market and trends in the market are summarized.

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Department Store
and
Specialty Store Sales

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Audrey S. Balchen, Director

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TABLE OF CONTENTS

Page

INTRODUCTION 1

SECTIONS:

I MULTI-STORE CORPORATIONS OPERATING DEPARTMENT & APPAREL SPECIALTY STORES (Number of stores in 1986 and ownership status as of December 1987) 2

II SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS (CONGLOMERATES, NATIONAL CHAINS) 10

III AVAILABLE SALES FIGURES--DEPARTMENT/APPAREL SPECIALTY STORE SALES: 1986 (Headquarter locations, By Region/State/City).......18

Northeast 18
Midwest 26
South 32
West 40

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E.B. Gold, Manager
Fairchild Book Division

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DEPARTMENT & APPAREL SPECIALTY STORE SALES FACT FILE

INTRODUCTION

The profile of general merchandise/apparel retailing has undergone tremendous changes over the past two years, brought about by the unprecedented number of mergers, acquisitions, consolidations and closings.

These developments have called for changes in the presentation of data from the format followed in earlier editions of this FACT FILE. The usual listing of stores with volume over $50 million, ranked by size, cannot be included, as changes in store ownership and consolidations are continuing and a listing based on 1986 sales volume would be meaningless.

The Fact File is organized into three sections.

Section I:	A current list of the major companies in general merchandise and apparel retailing, including changes in ownership of divisions or stores in 1986/1987, or currently underway.
Section II:	Information on sales of the major companies operating general merchandise and apparel stores, including conglomerates and national chains.
Section III:	Lists department stores and major apparel specialty stores by headquarter location, divided into the four major geographic divisions of the U.S. Only stores for which sales figures are available and which are believed to be reasonably accurate are included. Sources on sales include company annual reports and trade sources (the Fairchild trade press, Dun & Bradstreet, the National Retail Merchants Association, and other sources).

Current sales estimates, reflecting operations for the year 1986 for the most part, may differ markedly from estimates reported for previous years. This may be due in large part to changes in the number of stores operated; however, differences in methods followed in compiling estimates are also factors. Since revisions in earlier estimates may be in order, year to year comparisons should be made with caution.

I. MULTI-STORE CORPORATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES

(Number of stores in 1986 and ownership status as of Dec. 1987)

Corporation & Retail Divisions	Headquarter Location
Allied Stores Corporation (acquired by the Campeau Corp. Toronto, Ont, Canada, Oct. 1986. To be operated as an indirect wholly-owned subsidiary)	New York, NY
Stores Allied/Campeau expects to hold:	
Ann Taylor (91)	New York, NY
The Bon (Bon Marche) (39)	Seattle, WA
Brooks Brothers (45)	New York, NY
Jordan Marsh-New England (19)	Boston, MA
Maas Brothers/Jordan Marsh, Miami (38) These divisions were combined in 1987. Levy's Savannah, GA had been absorbed by Maas Bros. in 1986. (The sale of Mass Bros./Jordan Marsh to May Dept. Stores Co. may develop)	Tampa, FL
Read's (6) Merged into Jordan Marsh-New England in March 1987.	Bridgeport, CT
Stern's (29 including former Gimbels stores acquired from BATUS in 1986--of which seven in the Philadelphia area may be sold)	Paramus, NJ
Stores Allied/Campeau plans to sell:	
Dey's (4) Sale to a management group was cancelled in 1987.	Syracuse, NY
Sold By Allied/Campeau in 1987:	
Block's, Indianapolis, IN (10) and Herpolshiemer's (6), Grand Rapids, MI were combined and sold to Federated Department Stores, which integrated them with Lazarus Stores, Cincinnati, OH	
Bonwit Teller (13) Sold 1 store in CA to Federated, balance sold to Hooker Retail (U.S.A.), Atlanta, GA, April 1987	New York, NY
Cain-Sloan (4) Sold to Dillard Dept. Stores Inc., Little Rock, AR	Nashville, TN
Catherine's Stout Shops (210) Sold in 1987 to a management group.	Memphis, TN
Donaldson's (15) Sold to Carson Pirie Scott, Chicago, IL	Minneapolis, MN
Garfinckel's (10) Sold to Raleigh's, Washington, D.C. June 1987.	Washington, DC
Joseph Horne Co. (14) Sold to May Dept. Store Co., St. Louis, MO; later spun off to an investment group.	Pittsburgh, PA
Heer's (2) Sold to a management group.	Springfield, MO
Jerry Leonard (26) Sold to King Size Co., Brockton, MA	Omaha, NB
Joske's (27) Sold to Dillard Department Stores, Inc., Little Rock, AR (An antitrust probe has been initiated, however.)	Dallas, TX

(continued)

I. MULTI-STORE CORPORATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES
(Number of stores in 1986 and ownership status as of Dec. 1987)
(continued)

Corporation & Retail Divisions	Headquarter Location
Sold by Allied/Campeau in 1987 (continued)	
Miller & Rhoads (17)	Richmond, VA
Sold to a management group	
Miller's (12)	Knoxville, TN
Sold to Hess's, Allentown, PA.	
Plymouth Shops (51)	Carlstadt, NJ
Sold to Tribeca Holdings, and combined with Lamston's, Washington, DC (Plymouth Lamston Stores Corp.)	
Pomeroy's (112 in Harrisburg/Levittown, PA, operations were combined in Jan. 1987) Sold in June to Bon Ton Dept. Stores Div. of S. Grumbacher & Sons, York, PA which sold one of the stores to Boscov's Dept. Stores, Reading, PA. Boscov's bought three directly from Allied/ Campeau.	Harrisburg, PA
Amcena Corporation	New York, NY
JBryron's (56)	Miami, FL
EMS (Eastern Mountain Sports) (28)	New York, NY
Maurice's (400+)	Duluth, MN
Steinbach's (29)	White Plains, NY
Acquired from Supermarkets General in 1986. Has been combined with the former Howland and Hochschild operations.	
Uptons (17)	Atlanta, GA
Woman's World Shops (222) plus 22 shops operated under various names to be acquired from Wickes Cos., Inc., Santa Monica, CA.	El Cajon, CA
Associated Dry Goods (SEE MAY DEPARTMENT STORES CO.)	
BATUS, Inc. (B.A.T. Industries PLC)	New York, NY
Stores held as of Dec. 1987:	
The John Breuner Co. (furniture and furniture rental stores (17)	San Ramon, CA
Ivey's (25)	Charlotte, NC
(A consolidation of Ivey's-Carolinas & Ivey's-Florida)	
Marshall Field (25)	Chicago, IL
Saks Fifth Avenue (44)	New York, NY
Thimbles Specialty Stores Inc. (46)	New York, NY
Sold or closed in 1986/1987:	
The Crescent (3)	Spokane, WA
Frederick & Nelson (8)	Seattle, WA
(Both Crescent and Frederick & Nelson were sold to F&N Acquisition Co.)	
Gimbels-East (11)	New York, NY
9 stores sold to Allied, of which 8 became Stern's and 1 in Lancaster, PA, a Pomeroy's; 2 NYC stores were closed.	

(continued)

I. MULTI-STORE CORPORATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES
(Number of stores in 1986 and ownership status as of Dec. 1987)
(continued)

Corporation & Retail Divisions	Headquarter Location
BATUS, Inc. Stores Sold (continued)	
Gimbels-Midwest (3 sold to P.A. Bergner to become Boston Stores, Milwaukee, WI; 5 converted into Marshall Field, Chicago stores)	
Gimbels-Pittsburgh (3 sold to May Department Stores Co., St. Louis, MO to become Kaufmann's, Pittsburgh)	
Kohls (40) (Sold to Melvin Simon & Assoc., Robert Suslow & Assoc.)	Brookfield, WI
Campeau Corp. (See Allied/Campeau)	Toronto, Canada
Carson Pirie Scott & Co.	Chicago, IL
Carson Pirie Scott Department Stores (20)	Chicago, IL
Arcadia Shops (20)	Chicago, IL
Corporate Level (3)	Chicago, IL
County Seat (301)	Chicago, IL
Donaldson Department Stores (15) (Acquired from Allied Campeau, to be integrated into Carson's Chicago headquarters.)	Minneapolis, MN
CHH (Carter Hawley Hale) Split into two new divisions in August 1987:	
Carter Hawley Hale	Los Angeles, CA
The Broadway-Southern California (43)	Los Angeles, CA
The Broadway-Southwest (2 to be sold to May Dept. Stores to be converted to May D&F Stores, Denver. Option to buy the 3rd is held by Montgomery Ward.	Phoenix, AZ
Emporium Capwell (22)	San Francisco, CA
Thalhimers (24)	Richmond, VA
Weinstock Department Stores (12)	Sacramento, CA
Neiman Marcus Group (Control held by General Cinema)	
Bergdorf Goodman (1)	New York, NY
Contempo Casuals (165)	Los Angeles, CA
Neiman Marcus (22)	Dallas, TX
Sold:	
John Wanamaker Div. (15) Sold by CHH to Woodward & Lothrop, Washington, DC, but there is a price dispute to be settled. Wanamaker sold The Globe Stores, Scranton, to a local investment group.	Philadelphia, PA
Crown American	Johnstown, PA
Hess's Department Stores (41) (Acquired Miller's, Knoxville, TN in 1987)	Allentown, PA

I. MULTI-STORE CORPORATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES
(Number of stores in 1986 and ownership status as of Dec. 1987)
(continued)

Corporation & Retail Divisions	Headquarter Location
Dayton Hudson Corp.	Minneapolis, MN
Branden's	Minneapolis, MN
Dayton Hudson (37)	Minneapolis, MN
Lechmere (17)	Woburn, MA
Mervyn's (175)	Hayward, CA
Target (246)	Minneapolis, MN
Dillard Dept. Stores Inc. (117)	Little Rock, AR
Divisions:	
Little Rock, AR (20	
Fort Worth, TX (34)	
San Antonio, TX (23)	
St. Louis, MO (14)	
Tempe, AZ (20) (formerly Diamond's)	
Acquisitions:	
Cain Sloan, Nashville, TN and Joske's, Dallas, TX (acquired from Allied/Campeau) (Joske's may be re-sold to Foley's)	
Castner Knott Dry Goods Co., Nashville, TN (11 stores bought from Mercantile Stores)	
The Higbee Co., Cleveland was acquired from Briarly Investments Ltd. by Dillard Dept. Stores and the Edward J. DeBarto's Corp. in Dec. 1987.	
Dylex Limited (stores owned or partially owned)	Toronto, Ont., Canada
Brooks Fashion Stores (777) (in Chapter 11)	New York, NY
Foxmoor Chain (609)	West Bridgewater, MA
The Wet Seal (18)	Irvine, CA
Edison Brothers Stores, Inc. (1,072 apparel stores)	St. Louis, MO
Fashion Conspiracy	St. Louis, MO
Oak Tree	St. Louis, MO
Jeans West	St. Louis, MO
Size 5-7-9 Shops	St. Louis, MO
Elder Beerman Stores Corp.	Dayton, OH
Elder Beerman Department Stores (26)	Dayton, OH
Margo's Division (102)	Dallas, TX
Federated Department Stores, Inc. (260 dept. stores) plus specialty stores	Cincinnati, OH
Abraham & Straus (14)	Brooklyn, NY
Bloomingdale's (16)	New York, NY
Bullock's (25)	Los Angeles, CA
Burdine's (19)	Miami, FL
The Children's Place (163)	Pine Brook, NJ
Filene's (10)	Boston, MA
Filene's Basement (22)	Wellesley, MA
Foley's/Sanger Harris (Dallas) Merged Jan. 1987)	Houston, TX
Gold Circle (merged with Richway in 1986) (50+)	Columbus, OH
Goldsmith's (5)	Memphis, TN
Lazarus (32)	Cincinnati, OH
Shillito/Rikes, Cincinnati, was merged into the Lazarus operation in 1986. In 1987, Blocks/Herpolsheimer, acquired from Allied/Campeau, was merged into Lazarus; 3 Lazarus units in Indianapolis were sold to Montgomery Ward)	
I. Magnin (26)	San Francisco, CA
MainStreet (15)	Chicago, IL
Rich's (20)	Atlanta, GA

I. MULTI-STORE CORPORATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES

(Number of stores in 1986 and ownership status as of Dec. 1987)
(continued)

Corporation & Retail Divisions	Headquarter Location
General Mills, Inc.	Minneapolis, MN
Eddie Bauer (39)	Redmond, WA
The Talbots, Inc. (84)	Hingham, MA
(Both retail operations are up for sale)	
Hartmarx (Hartmarx Specialty Div.) (230)	Chicago, IL
Baskin Clothing Co.	Chicago, IL
Ray Beers	Topeka, KS
Blackburn's	Amarillo, TX
Capper & Capper, Ltd.	Detroit, MI
Chas. A. Stevens	Chicago, IL
deJong's	Evansville, IN
Field Brothers	New York, NY
Arthur Frank	Salt Lake City, UT
Frank Brothers	San Antonio, TX
Hanny's	Phoenix, AZ
Hasting's	San Francisco, CA
Heyward Mahon	Greenville, SC
Jack Henry	Kansas City, MO
J.O. Jones	Greenville, SC
Kleinhans	Buffalo, NY
Klopfenstein's	Seattle, WA
Leopold Price & Rolle	Houston, TX
Levy-Wolf	Jacksonville, FL
Liemandt's	Minneapolis, MN
Littler	Seattle, WA
Merritt Schaefer & Brown	Austin, TX
National Clothing	St. Louis, MO
Polo Shop	Seattle, WA
Porter Stevene	New Orleans, LA
Root's	Summit, NJ
Schulman's	Norfolk, VA
Silverwood	Los Angeles, CA
F.R. Tripler & Co.	New York, NY
Walkers	Columbus, OH
Wallachs	New York, NY, Miami, FL, etc.
Jas. K. Wilson	Dallas, TX
Wolf Bros.	Tampa, FL
Zachry	Savannah, GA
Hooker Retail, USA (Hooker Corp. Ltd.)	Melbourne, Australia
Acquisitions: 1987	
B. Altman & Co. (5)	New York, NY
Bonwit Teller (13)	New York, NY
The Parisian (16) (In partnership with a group of shareholders)	Birmingham, AL
Sakowitz Inc. (4) (pending approval by Federal Bankruptcy Court)	Houston, TX
Interco, Inc. (201 jr. dept. stores, spec. stores, home improvement centers)	St. Louis, MO
Fine's Men's Shops, Inc.	Norfolk, VA
Golde's Department Stores (9)	St. Louis, MO
Idaho Department Stores Co.	Caldwell, ID
Sky City Stores, Inc.	Asheville, NC
United Shirt Distributors, Inc.	Detroit, MI

I. MULTI-STORE CORPORATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES
(Number of stores in 1986 and ownership status as of Dec. 1987)
(continued)

Corporation & Retail Divisions	Headquarter Location
The Limited, Inc.	Columbus, OH
Henri Bendel (1)	New York, NY
Lane Bryant (579 stores plus mail order)	New York, NY
Lerner Stores Corp. (750)	New York, NY
Limited Express (286)	Columbus, OH
Sizes Unlimited (247)	New York, NY
Victoria's Secret (167 stores plus mail order)	Columbus, OH
R.H. Macy & Co., Inc.	New York, NY
Macy's Atlanta (16)	Atlanta, GA
Macy's California (25)	San Francisco, CA
Macy's New York (22)	New York, NY
Macy's New Jersey (24)	Newark, NJ

A new specialty retailing venture was announced by R.H. Macy in Sept. 1987. The first 3 pilot stores, Aeropostales, were opened in Nov. 1987--2 in New Jersey, 1 near San Francisco. The second specialty chain is to be called Charter Club, and a private label intimate apparel line will be called Fantasies by Morgan Taylor. Some 6 to 8 stores will be opened in 1988 between the 3 chains, according to present plans.

Corporation & Retail Divisions	Headquarter Location
The May Department Stores Co. (Acquired Associated Dry Goods Co. in Oct. 1986)	St. Louis, MO
Held By May Department Stores Co.:	
L.S. Ayres (25) (Stewart's, Louisville, KY, was merged with Ayres in the Fall of 1986. 5 stores were sold by May to Snyder's Inc., Louisville, KY, Oct. 1987; 2 KY stores were sold to Burlington Coat Factory and to a developer, The Rouse Co., leaving 18 Ayres stores).	Indianapolis, IN
Caldor, Inc.	Norwalk, CT
Famous Barr (17)	St. Louis, MO
G. Fox (9)	Hartford, CT
Goldwater's (9)	Scottsdale, AZ
Hahne's (9)	Newark, NJ
Hecht's (22)	Arlington, VA
Kaufman's (including 3 former Gimbels-Midwest stores acquired from Amcena and 9 former Strouss stores, Youngston, Ohio, owned by Mays)	Pittsburg, PA
Loehmann's (90)	Bronx, NY
Lord & Taylor (45)	New York, NY
May-Cohens (5)	Jacksonville, FL
May Co. (10)	Cleveland, OH
May Co. (34)	North Hollywood, CA
May D&F (14) Includes 4 former Denver Dry Goods Stores, one of which was incorporated into an existing May D&F)	Denver, CO
Meier & Frank (8)	Portland, OR
M. O'Neil Co. (8)	Akron, OH
J.W. Robinson (24)	Los Angeles, CA
Sibley's (13)	Rochester, NY
Venture Stores (15) (A planned purchase of Dey's, Syracuse, NY, (4 stores) from Campeau was cancelled in June 1987)	O'Fallon, MO

I. MULTI-STORE CORPORATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES
(Number of stores in 1986 and ownership status as of Dec. 1987)
(continued)

Corporation & Retail Divisions	Headquarter Location
May Department Stores Co. (continued)	
Sold By May Department Stores Co.:	
Robinson's of Florida (10)	Tampa, FL
Sold to Maison Blanche-Goudchaux, Baton Rouge, LA)	
Joseph Horne Co. (13) (Acquired from Campeau, then sold to an investment group, 1987)	Pittsburgh, PA
Denver Dry Goods Stores (12 stores)	Denver, CO
2 were sold to Penney, 3 to Mervyn's, 4 converted to May D&F (an noted above). Balance sold to a developer or closed.	
Sycamore Specialty Stores Div. (111)	Indianapolis, IN
Sold to an investment group.	
Melville Corp.	Harrison, NY
Chess King (536)	Worcester, MA
Marshall's, Inc. (261)	Wakefield, MA
Wilson's House of Suede (175)	Los Angeles, CA
Mercantile Stores Co., Inc.	Wilmington, DE
Bacon's (6)	Louisville, KY
Castner Knott Co. (11)	Nashville, TN
Sold to Dillard Dept. Stores, Little Rock, AR	
deLendrecie's (1)	Fargo, ND
Gayfer's/Montgomery Fair (6)	Montgomery, AL
C.J. Gayfer	Mobile, AL
Glass Block (1)	Duluth, MN
Hennessey's	Billings, MT
The Jones Store Co. (8)	Kansas City, MO
Joslin's (11)	Denver, CO
Lion (3)	Toledo, OH
McAlpin's (9)	Cincinnati, OH
Root's (1)	Terre Haute, IN
J.B. White (7)	Augusta, GA
Petrie Stores Corp. (1,474 stores)	Secaucus, NJ
Davids	Secaucus, NJ
G & G Shops	New York, NY
Hartfield's	Secaucus, NJ
Jean Nicole	Secaucus, NJ
Marianne	Secaucus, NJ
Petrie's	Secaucus, NJ
Rave	Secaucus, NJ
Stuart's	Secaucus, NJ
Three Sisters	Secaucus, NJ
Winkelman's	Detroit, MI

I. MULTI-STORE OPERATIONS OPERATING DEPARTMENT AND APPAREL SPECIALTY STORES

(Number of stores in 1986 and ownership status as of Dec. 1987)
(continued)

Corporation & Retail Divisions	Headquarter Location
U.S. Shoe Corp. (Retail Division: 2,267 stores)	Cincinnati, OH
August Max (64)	New York, NY
Cabaret (7)	? ?
Career Image (81)	Enfield, CT
Caren Charles (145)	Enfield, CT
Casual Corner (702)	Enfield, CT
Crackers	Enfield, CT
Front Row (11)	Enfield, CT
Little Folks Shop	Enfield, CT
T.H. Mandy (17)	Merrifield, VA
Outletters	Enfield, CT
Outrigger	Enfield, CT
Petite Sophisticate (97)	Enfield, CT
The Proving Ground	Enfield, CT
J. Riggings (218) (sold to Edison Bros.)	Atlanta, GA
Sophisticated Woman (3)	Enfield, CT
The Proving Ground	Enfield, CT
Ups 'N Downs (361)	Enfield, CT
F.W. Woolworth Co.	New York, NY
Holtzman's Little Folk Shop (Kids Marts (262), Little Folks Shops (15)	New York, NY
The Richman Brothers Co. (Anderson Little) (319)	Cleveland, OH
U.S. Woolworth (1,164)	New York NY

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS
(CONGLOMERATES, NATIONAL CHAINS)

The following companies have major positions in general merchandise/apparel retailing, in many cases operating a number of divisions or stores with different names. A list of pertinent divisions of major companies will be found in Section I.

Many of the listed companies are engaged in activities other than general merchandise/apparel retailing, including the operation of supermarkets, furniture outlets, shoe stores, manufacturing, wholesaling, etc. Unless otherwise noted, total company sales includes all operations in the latest fiscal year available, or latest annual estimate--generally reflecting 1986 operations.

Available information on sales of specific divisions or stores (department or apparel specialty) operated by multi-activity companies is covered in Section III.

Company	SALES (Millions of $)
Allied Dept. Stores, Savannah, GA (116 stores)	$ 52.0
Allied Stores/Campeau, New York, NY (797 stores) (Operated Catherine's Stout Shops, Memphis--207 stores with sales totaling $104.1 million--which were sold to a management group in 1987. Plymouth Shops--51 stores with sales of $61.2 million were sold to Tribeca Holding Co. in 1987 and will be combined with Lamston's)	1,245.0
Amcena Corp., New York, NY (800 stores) (Among Amcena's operations is Steinbach's, White Plains, NY-29 stores, with a volume of $170 million, of which 23 were acquired from Supermarkets General and combined with the Hochschild, Howland's stores. Ohrbach's was dissolved in 1986, and 5 stores were combined with the Steinbach's operation. 222 Woman's World and other women's specialty stores were purchased from Wickes Cos. Inc., Santa Monica)	not available
Ames Department Stores, Rocky Hill, CT (463 stores) (operates Ames, Murphy's Mart and G.C. Murphy's stores in 20 states).	1,809.9
Amfac, Inc., San Francisco, CA (9 stores in Hawaii plus 30 resort/specialty stores)	220.0
C.R. Anthony, Oklahoma City, OK (C.R. Anthony Holding Co./Citicorp Venture Capital Ltd.) (268 stores)	411.3
Joseph A. Bank Clothiers Inc., Baltimore, MD (34 states and Catalog)	136.0
BATUS, Louisville, KY (50 department stores, 90 specialty stores) 57 homefurnishings stores. Operates 2 department store divisions--Ivey's, Charlotte, NC and Marshall Field, Chicago, IL.	2,471.3

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS
(CONGLOMERATES, NATIONAL CHAINS)
(continued)

Company	SALES (Millions of $)
Beall's (3 Beall Brothers, Jacksonville, FL) (150 stores; may be acquired by Citicorp Venture Capital Ltd. and some stores merged with CR Anthony, Oklahoma City, OK)	$ 325.0
L.L. Bean, Freeport, ME (One store with a volume of $54 million plus 22 catalogs and manufacturing)	368.0
Belk Stores Services Inc. (350 Belk and Liggett department stores in 16 states.)	3,000.0
Benetton, New York, NY (600 U.S. stores affiliated but operator-owned) (Company total volume: $846 million)	800.0
Bradlees, Braintree, MA (Stop & Shop Companies) (162 discount department stores.)	1,873.0
Brown Group Inc., St. Louis, MO Specialty Store Div. (Includes Cloth World, Meis Family Fashions, Linen Center, Etage)	344.3
Burlington Coat Factory, Burlington, NJ (87 stores)	391.6
CWT Specialty Stores Inc., South Attleboro, MA (59 stores)	111.6
Carroll Reed Ski Shops Inc. (CML Group Inc., Acton, MA)	42.0
Carson Pirie Scott, Chicago, IL Retail Group total: (Includes 20 department stores with volume of $435 million, 301 County Seat stores with volume of $325 million; also Corporate Level and Arcadia stores. A specialty store division was established in 1987 and 15 Donaldson's, Minneapolis stores were acquired from Allied/Campeau)	781.8
Carter Hawley Hale, Los Angeles, CA (114 department stores, 188 specialty)	4,089.8
Charming Shoppes, Bensalem, PA (678 stores in 1986; 750 by end of 1987) (Operates Fashion Bug, Fashion Bug Plus Stores)	525.2
Chas. A. Stevens, Chicago, IL (operates Chas. A. Stevens, Chas. A. Stevens Petites, CHAS stores) (26 stores)	70.0
Child World, Avon, MA. (134 stores)	628.8
Claire's Stores Inc., Miami, FL (Claire's Boutiques) (439 stores)	87.2
Clothestime, Anaheim, CA. (263 stores)	160.7
Consolidated Stores Corp., Columbus, OH (219 stores)	397.2
Conston Corp. (Conston Holding Co.) Philadelphia, PA (Women's specialty stores)	131.0

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS
(CONGLOMERATES, NATIONAL CHAINS)
(continued)

Company	SALES (Millions of $)
Dayton Hudson Corp., Minneapolis, MN (Includes sales of 175 Mervyn's: $2,862 million, 246 Target Stores: $4,355 million; 17 Lechmere specialty stores: $475.6 million; 37 department stores: $1,566.3 million, Mervyn's operated 188 stores with a total volume of $2.9 billion. Mervyn's bought 3 Denver Stores from May Co. in 1987, and plans to open 21 stores)	$ 9,259.1
Deb Shops, Philadelphia, PA (231 stores)	181.4
Dillard Department Stores, Inc., Little Rock, AR (138 stores in 5 divisions) Tempe, AZ Div.: 19 stores; Little Rock, AR: 26; St. Louis, MO: 24; Fort Worth, TX: 40; San Antonio, TX: 29; In 1987, Dillard bought Cain Sloan a 40 unit Nashville specialty chain with 1987 volume projected to $73.1 million, and Joske's, Dallas, TX a 27 unit department store chain with 1987 volume projected to $375.5 million from Allied/Campeau. The latter purchase is incomplete at the present time due to an antitrust investigation. Also bought Castner Knott Day Goods Co., 11 stores with a volume of $225.8 from Mercantile stores), and is participating in the purchase of The Higbee Co., Cleveland, OH.	1,851.4
Dollar General Corp., Scottsville, KY (1,303 stores plus wholesale operations)	564.8
Dress Barn, Inc., Stamford, CT. (263 stores)	173.7
Duckwall-Alco Stores (subsidiary of H.D. Holdings Co. Inc), Abilene, KS (118 stores)	344.0
The Dunlap Co., Fort Worth, TX. (31 stores) Junior department stores operating under various names: Striplings & Cox, Hirsh, Lintz, etc.)	125.0
Dylex Ltd., Toronto, Ont., Canada (Retail sales total: $1,120.7 million)	
Part owner U.S. stores: Brook's Fashion Stores, NY (777 stores)	412.0
Foxmoor, West Bridgewater, MA (609 stores)	255.0
Edison Brothers, St. Louis, MO (2,475 stores including shoe stores)	904.2
(Apparel store division: 1,072 stores)	334.0
(Edison acquired the J. Riggings chain from U.S. Shoe in 1987)	
Elder-Beerman Stores, Dayton, OH (237 stores) (Operated 26 department stores with 1986 sales of $285 million, 102 Margo's specialty stores, Dallas, with volume over $55 million, as well as 108 shoe stores, 2 furniture stores. To be merged with E.C. Acquisitions Co. and become private)	380.8
Evans, Inc., Chicago, IL (25 fur specialty stores plus leased departments in 12 department stores).	156.0
Family Dollar Stores, Inc., Charlotte, NC (1,107 discount variety stores in 23 states).	487.7

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS
(CONGLOMERATES, NATIONAL CHAINS)
(continued)

Company	SALES (Millions of $)
Fedco, Santa Fe Springs, CA (9 Direct Membership dept. stores)	$ 635.0
Federated Department Stores, Inc., Cincinnati, OH (631 dept. and spec. stores, mass merchandisers, plus 27 supermarkets) (260 dept. stores with 1986 sales totaling $6,974.3 million) (Accessory Place Stores were opened in 1987)	10,512.4
The GAP, San Bruno, CA (724 Stores) (Operates 633 Gap stores, 16 Gap Kids, 75 Banana Republic stores. (A new chain, Hemisphere, carrying sportswear was opened in 1987)	848.0
General Mills Inc., Minneapolis, MN (135 stores including furniture plus catalog sales) (Includes 39 Eddie Bauer Inc., Redmond, WA stores with sales of $250 million including catalog; 39 The Talbots Inc., Hingham, MA with sales amounting to $224.0 including catalog. General Mills plans to sell both retail operations)	474.3
W.R. Grace & Co., New York, N.Y. Specialty Retailing (Berman's, "The Leather Experts", Sheplers, Inc.) (144 stores)	181.0
Hartmarx, Chicago, IL (440 stores) (Includes 210 Kuppenheimer, Atlanta, GA stores, with sales of $160.0 million; and 230 Hartmarx Specialty Stores Inc., with sales of $415.1 million, including sales of 80 Country Miss stores)	575.1
Heck's, Inc., Charleston, W.Va. (158 discount department stores) Operating in Chapter 11 of U.S. Bankruptcy Code in 1987)	566.3
Hess's, Allentown, PA (Crown American Corp.) (41 stores) (Acquired 12 Miller's Department Stoes, Knoxville, from Allied/Campeau in 1987 with sales reported at $107.2 million)	367.5
Hills Department Stores, Canton, MA (SCOA) (137 stores)	1,343.1
Interco, Inc. St. Louis, MO -	
General Retailing Merchandising Group: (201 stores)	498.3
Apparel Specialty Groups	817.7
Jamesway Corp., Secaucus, NJ (100 stores)	612.4
K mart Corp., Troy, NY	
(3,783 stores, including books, etc.)	23,812.0
(2,204 K mart stores)	21,308.0
(Plans to sell 38 U.S. Kresage stores and 18 Jupiter stores to McCrory Stores, York, PA. Designer Depot was divested by K mart at end of 1986)	
Kline Bros., Cleveland, OH (25 stores) (24 Kline stores plus 1 Katz Dept. Store in Stillwater, OK)	75.0

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS (CONGLOMERATES, NATIONAL CHAINS)
(continued)

Company	SALES (Millions of $)
The Limited, Inc., Columbus, OH (2,682 stores) (Includes 7 Retail Divisions, 2 Mail Order Divisions with sales of $450 million from 6 catalogs) Lane Bryant - 579 stores, sales $500 million Victoria's Secret - 167 stores, sales $125 million The Limited - 654 stores, sales $900 million Lerner - 750 stores, sales $650 million Sizes Unlimited - 247 stores, sales $150 million Henri Bendel - 1 store, sales $25 million Limited Express - 286 stores, sales $250 million (The Limited plans to buy Abercrombie & Fitch from Oshman's)	$ 3,142.7
R.H. Macy & Co., New York, NY (privately owned as of Sept. 1986) (97 stores) (Operates 4 divisions of department stores: New York, New Jersey, Georgia, California. In Sept. 1987, Macy announced plans to open 3 or more specialty chains, the first to be called Aeropostale, followed by opening of Charter Club stores)	$ 4,650.0
May Department Stores, St. Louis, MO (Acquired Associated Dry Goods Corp. in 1986) (2,877 stores) (Operates dept. stores and specialty stores, including Loehmann's, NY - 90 stores with sales of $351 million; Caldor, Norwalk, CT - 115 stores with sales of $1,411 million; Venture stores - 65 with sales of $1,129 million) The Sycamore Specialty Stores Div. - 111 stores - was sold in 1987 to a group of investors.	10,376.0
McCrory Stores Corp. (Subsidiary of Rapid American Corp.) New York, NY --Operated 5 and 10 stores under various names (McCrory, H.L. Green, J.F. Newberry, S.H. Kress, etc.) (1,226 stores) (Will acquire 58 U.S. Kresge stores and 18 Jupiter stores from K mart in 1987)	1,883.0
McRae's, Jackson, MS (including Pizitz, Birmingham, AL) (29 stores)	350.0
Melville Corp., Harrison, NY (5,833 stores) (Operates specialty stores including toys, HBA, leased shoe departments, shoe stores, apparel stores, etc.	5,262.4
Apparel stores (973 stores)	1,756.7
Marshall's, Woburn, MA (261 stores)	1,409.8
Chess King, Worcester, MA (536 stores)	251.7
Wilson's House of Suede, Los Angeles, CA (176 stores)	95.1
Mercantile Stores, New York, NY (82 stores) (Includes 13 general merchandise store chains and 20 free-standing beauty salons)	2,028.2
Merry-Go-Round Enterprises, Inc., Townson, MD (388 stores)	207.5

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS
(CONGLOMERATES, NATIONAL CHAINS)
(continued)

Company	SALES (Millions of $)
Montgomery Ward (Mobile Corp.) New York, NY (320 stores) (Operates 295 stores including 43 specialty stores with sales of $4.4 billion, plus 25 liquidation centers) Sales in 1987 are estimated at $4.2 billion. Mobile may sell Montgomery Ward	$ 5,065.0
B.C. Moore & Sons (80 specialty stores in AL, FL, GA, NC, SC)	75.0
Mothercase Stores (200+ stores operating under various names)	75.0
S.E. Nichols, Inc., New York, NY (45 stores) (Self-service discount dept. stores and automotive service centers, home improvement centers, etc.)	310.0
Nordstrom Inc., Seattle, WA (65 stores) (Operated 38 specialty stores plus 8 Place Two Outlets; also 12 shoe stores and leased shoe departments, 8 The Rack clearance stores. Nordstrom will open its first East Coast store March 1988 at Tyson's Corners, VA)	1,629.9
Oshman's Sporting Goods Inc., Houston, TX (188 stores) (Operates Abercrombie & Fitch which had an estimated volume of $48 million in 1986, $50 million in 1987) This is to be sold to The Limited, Columbus, OH.	322.9
Pamida, Omaha, NB (discount stores)	504.0
Paul Harris Stores Inc., Indianapolis, IN (296 stores) (Operates 214 apparel specialty stores, 39 Clothes Out Junction stores, 20 Pasta sportswear stores)	161.0
J.C. Penney Co., Inc., New York, NY (Sales including extraordinary loss)	14,740.0
Penney Stores 1403	12,888.0
Catalog Centers 1825	2,332.0
Drug Stores (Thrifty/Treasury Drug Stores)	390
Belgian Stores (Sarma) 52	
(In 1987 Penney acquired Stinu Corp. of America, operator of units, a women's wear chain, expected to reach $57 million in 1988, and has announced plans to open a specialty chain-Mixit--about 100 stores selling moderately-priced junior wear)	
Petrie Stores Corp., Secaucus, NJ (1474 stores)	1,198.4
Phillips Van Heusen Corp., New York, NY (156 stores) (Combined sales of $75 million for 12 Hamburger's, 7 Kennedy's, 6 Juster's, 19 Harris & Frank stores; also operated 111 PVH Outlet Stores)	133.4
Pic'n Save, Carson, CA (101 stores)	304.5
H.C. Prange Co., Sheboygan, WI. (21 stores plus leased departments) (Discount dept. store sales estimated at $162 million)	339.0

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS
(CONGLOMERATES, NATIONAL CHAINS)
(continued)

Company	SALES (Millions of $)
Retail Ventures, Inc., Warrendale, PA (240 stores)	$ 220.0
Rose's Stores Inc., Henderson, NC (204 stores)	1,009.2
Ross Stores Inc., Newark, CA (121 stores) (Off price retail stores: apparel, footwear, linens)	534.4
Salkin & Linoff, Minneapolis, MN (358 stores) (Operates 14 department stores with sales of $4.0 million plus apparel stores and leased departments under various names)	110.0
Sears, Roebuck & Co., Chicago, IL. Merchandising Group (U.S.) 1,067 stores plus catalogs (Operates 806 general merchandise stores, 261 specialty stores. Sears is expanding its specialty store operations and in Dec. 1987 announced plans to acquire Pinstripe Petites, Minneapolis, MN based, 25-unit specialty chain)	22,092.0
Shopko Stores (SuperValu, Green Bay, WI (65 stores)	915.4
Spiegel, Inc. (Catalog sales)	1,000.0
Sprouse-Reitz Stores, Portland, OR (321 stores) (Operates a variety store chain)	205.6
Strawbridge & Clothier, Philadelphia, PA (33 stores)	739.1
Department Stores (12 stores)	432.1
Clover Discount Stores (21 stores)	307.0
Stuarts Department Stores, Inc., Hopkinton, MA (21 stores)	120.3
Spurgeon Mercantile Corp., (83 stores)	73.0
Susie's (Kinney Shoe Corp., New York, NY) (245 stores)	90.0
Toys "R" Inc., Rochelle Park, NJ (342 stores) (Operates 43 Kids "R" Us stores with sales estimated at $125 million; also 295 Toys "R" Us stores, 2 Boston Department Stores, NY, and 2 The Fair, Flint, MI stores)	2,444.9
U.S. Shoe Corp., Cincinnati, OH. Retail Div. (2,267 stores) (Includes 1,600 apparel stores including 702 Casual Corner stores which had sales estimated at $550 million and 300 Ups 'N' Downs stores with sales estimated at $667 million. U.S. Shoe sold J. Riggings stores to Edison Bros. in 1987)	1,450.2
Volume Merchandise Inc. (Parkland Hosiery, New Hyde Park, NY) (116 stores)	42.0

II. SALES OF MAJOR APPAREL/GENERAL MERCHANDISE RETAILERS
(CONGLOMERATES, NATIONAL CHAINS)
(continued)

Company		SALES (Millions of $)
Wal Mart Stores, Inc., Bentonville, AR (Stores & Wholesale Clubs)		$11,909.1
Wal Mart Stores (980 stores)		10,231.1
Sam's Wholesale Clubs & other (58 stores)		1,678.0
Acquired 21 Super Saver Clubs in 1987. Will open 2 Hypermarket USA stores in 1987.		
Weathervane, New Britain, CT (83 Weathervane stores, 8 J. Putnam, 13 D & L Venture Stores)		135.0+
Weiner's Stores, Houston, TX (118 stores)		225.0
F.W. Woolworth Co., New York, NY (6,309 stores, incl. shoe stores drug stores, etc.)		6,501.0
U.S. Woolworth, NY (1,164 stores)		1,954.0
Richman Bros. (198 stores) Anderson Little (121 stores)	(total of 319 stores)	261.0
Little Folk Shops Kids Mart (262 stores) Little Folk Shop (15 stores)	(total of 277 stores)	not available
(Richman is opening Cotton Supply Co. Stores in 1988)		
Zayre Corp., Framingham, MA (1,092 stores)		5,350.6
Zayre's (362 stores)		3,046.1
Apparel specialty stores (687 stores)		1,394.6
T.J. Maxx, Framingham, MA (226 stores)		1,010.0
Hit Or Miss Shops, Staughton, MA (461 stores)		384.0

SECTION III - AVAILABLE SALES FIGURES
DEPARTMENT/ APPAREL SPECIALTY STORES: 1986
(Headquarter Locations By Region, State & City)

NORTHEAST	APPROX. SALES (Millions of $)
CONNECTICUT	
Bridgeport/Trumbull	
Countdown of Connecticut (25 specialty stores)	$ 17.0
Read's Department Stores (Allied/Campeau, New York, NY) (6 stores: CT. 5, NY 1, merged with Jordan Marsh, Boston, MA, March 1987)	117.0
Enfield	
Casual Corner (U.S. Shoe Corp., Cincinnati, Ohio) (702 spec. stores)	550.0
Hartford	
G. Fox & Co. (May Dept. Stores Co., St. Louis, MO) (9 stores: CT 7, MA 1, RI 1)	264.0
(A store in Galleria, Poughkeepsie, NY was opened in 1987)	
Sage-Allen & Co. (14 jr. dept. stores: CT 13, MA 1)	77.7
(Purchased by a management group in 1987. Store in Leominster, MA is to be opened in mid-1988)	
Middletown	
Bob's (4 spec. stores)	50.0
Milford	
Wild Bills Inc. (8 spec. stores)	15.0
New Britain	
Weathervane (83 Weathervane stores, 8 J. Putnam stores, 13 D&L Venture Stores)	135.0+
Stratford	
Trim Fashion (32 spec. stores)	12.0
Sifer's Safariwear (7 spec. stores)	13.0
Yale Co-op. (3 spec. stores)	12.0
Waterbury	
S.H. Greenburg Inc. (7 Worth's spec. stores)	10.0+
MAINE	
Damariscotta	
R.H. Remy, Inc. (14 jr. dept. stores in ME)	12.0
Freeport	
L.L. Bean (22 mail order catalogs plus one store with a sales volume of $50 million plus, also manufacturing)	390.0
Portland	
Levinsky's (1 spec. store)	14.7
Porteous Mitchell & Braun Co. (6 dept. stores: ME 4, NH 1, VT 1)	40.0

DEPARTMENT/APPAREL SPECIALTY STORES

NORTHEAST	APPROX. SALES (Millions of $)
MASSACHUSETTS	
Allston	
Alden's, Inc. (26 spec. stores)	$ 20.0
Boston Area	
Filene's (Federated Department Stores, Cincinnati, OH) (16 department stores: MA 10, NH 2, ME 1, RI 1, CO 1, NY 1)	390.8
Chestnut Hill (to be renovated)	55.0
(3 small stores in Hanover, MA; Poughkeepsie, NY; Berkshire, MA were opened in Nov. 1987)	
Filene's Basement, Wellesley (Federated) (22 stores: CT 1, MA 11, NY 5, NJ 3, RI 1, PA 1)	252.1
Jordan Marsh-New England, (Allied/Campeau, New York, NY) (19 dept. stores: CT 1, MA 12, ME 1, NH 2, NY 2, RI 1)	580.0
(Read's Dept. Stores, Bridgeport, CT, 6 stores with a volume estimated at $117.0 million in 1987, were merged into Jordan Marsh in 1987. A Jordan Marsh store was opened in Poughkeepsie, NY in March 1987)	
Braintree	
Decelle (7 spec. stores)	27.5
Northeast Apparel (60 spec. stores)	100.0
Cambridge	
Fortune Inc. (16 spec. stores)	43.0
Harvard Cooperative Society (6 stores)	50.0
Fall River	
Liss, Inc. (11 spec. stores)	18.0
Framingham	
T.J. Maxx (Zayre Corp., Framingham) (226 stores)	1,010.0
Hingham	
The Talbots (General Mills, Minneapolis, MN) (84 stores)	224.0
(24 stores were opened in 1987. Stores account for 60% of sales; catalogs, 40%)	
Hyannis	
Puritan Clothing (8 spec. stores)	16.5
Lynn	
Hoffman's (4 spec. stores)	17.0
New Bedford	
Gentlemen's Warehouse (27 spec. stores)	20.0
Shrewsburg	
The Casual Male Inc. (142 stores)	35.0
South Attleboro	
Cherry Webb & Touraine (55 spec. stores)	96.0
Springfield	
Albert Steiger, Inc. (8 dept. stores: MA 7, CT 1)	73.0
Topsfield	
Empire Clothing Co. (19 spec. stores in MA & ME)	20.0

DEPARTMENT/APPAREL SPECIALTY STORES

NORTHEAST	APPROX. SALES (Millions of $)
MASSACHUSETTS (continued)	
Waltham	
Grover Cronin, Inc. (1 jr. dept. store)	$ 12.0
Woburn	
Marshall's (Melville Corp., Harrison, NY) (261 stores)	1,409.8
Worcester	
Chess King (Melville Corp., Harrison, NY) (536 stores)	251.7
NEW JERSEY	
Beach Haven	
Hand Store, Inc. (4 jr. dept. stores)	12.0
Burlington	
Burlington Coat Factory (87 spec. stores)	391.6
Cranford	
Cosco (30 spec. stores)	15.0
Lawrenceville	
S.P. Dunham Inc. (3 spec. stores: NJ 2, PA 1)	15.0
Moorestown	
Feld & Sons (8 spec. stores)	40.0
Morristown	
M. Epstein, Inc. (3 stores)	33.0
Newark	
Hahne & Co. (May Dept. Stores Co., New York, NY) (8 dept. stores in NJ) (The former Gimbels Garden State store in Paramus will become a flagship store. Bridgewater Commons store to open in 1988)	153.0
Macy's New Jersey (formerly Bamberger's) (RH Macy Co., New York, NY) (25 stores: NJ 15, PA 5, NY 1, DE 1, MD 3) (1987 store openings: Marley Station and Baltimore, MD, Hamilton Township, NY, Tyson's Corner, VA)	1,440.0
Paramus	
Stern's (Allied/Campeau, New York, NY) (27 dept. stores including 9 former Gimbels-East stores acquired from BATUS: NJ 9, NY 12, PA 6) (Yonkers Cross County Shopping Center store on site of former Gimbels East, was opened April 1987. Expected 1st year volume: $50 million. Bridgewater Commons, Bridgewater, NJ store to open Feb. 1988; Toms River, NJ store to open in April 1988)	448.9
Patterson	
Jacobs Department Store (1 jr. dept. store)	11.0
Pennsauken	
I. Goldberg (7 spec. stores in DE, NJ, PA)	22.0
Jack Lang Clothes (33 spec. stores in DE, NJ, PA, MD, VA)	30.0

DEPARTMENT/APPAREL SPECIALTY STORES

NORTHEAST

	APPROX. SALES (Millions of $)
NEW JERSEY (continued)	
Pine Brook	
The Children's Place (Federated Dept. Stores, Cincinnati, OH) (166 stores)	161.8
Ridgewood	
Brooks Sealfons (6 spec. stores)	24.0
Secaucus	
Daffy Dan's Bargaintown (8 stores in NJ, VA, NY)	38.0
Syms (20 spec. stores)	235.0
South Hackensack	
Joyce Leslie (32 spec. stores)	44.0
Summit	
Roots (Hartmarx Corp., Chicago, IL) (7 spec. stores)	22.0
Wayne	
Meyer Brothers (1 dept. store)	25.0
NEW YORK	
Baldwin	
The Pants Set (100 spec. stores in NJ under various names)	90.0
Buffalo	
Adam, Meldrum & Anderson (10 dept. stores in NY)	115.0
L.L. Berger, Inc. (7 spec. stores in NY)	15.0
Kleinhans Co. (Hartmarx Corp., Chicago, IL) (5 stores)	14.9
Sample, Inc. (10 spec. stores)	25.0
Cohoes	
Cohoes Specialty Stores (7 spec. stores: CT, NJ, NY, RI, VA)	17.5
Elmira	
S.F. Iszard, Inc. (3 jr. dept. stores in NY)	12.0
Garden City	
Field Bros. (Hartmarx Corp., Chicago, IL)	21.0
Latham	
Interstate Department Stores, Inc. (Toys "R" Us, Rochelle Park, NJ) Central buying office for two Boston Stores in NY and two The Fair Stores in MI.	37.0
New York City Area	
Abraham Brothers (incl. Lecours Bros., Sam Bros.) (100 spec. stores)	35.0
Abraham & Straus, Brooklyn (Federated Dept. Stores, Cincinnati, OH) (15 dept. stores: NY 9, NJ 4, PA 2) The two PA stores--King of Prussia and Willow Grove--were sold to Strawbridge & Clothier, Philadelphia in 1986. A&S will open a store in Valley Stream, NY and plans to open on the site of the former Gimbels, NYC in 1989.	778.6
Alcott & Andrews (10 spec. stores in CT, CA, DC, GA, IL, MD, NJ, NY)	28.0

NORTHEAST New York City Area (continued)	SALES (Millions of $)
Alexander's Dept. Stores, Inc. (14 dept. stores CT, NJ, NY) Mohegan Lake, NY store was closed in Feb. 1986.	$ 520.0
B. Altman & Co. (Investors' group which acquired Altman's in 1986 sold total control to Hooker Corp., Australia in Oct. 1987 (6 stores) The Fifth Ave. flagship store will be reduced in size.	211.0
Ann Taylor (Allied/Campeau, New York, NY) (91 spec. stores)	200.0+
Ashley's Ltd. (5th Retail Corp.) (30 spec. stores)	30.0
Associated Retail Stores (95 spec. stores)	50.0
Barney's (1 spec. store) A women's spec. store was opened in Sept. 1986, which was expected to reach a volume of $25 million in its first year.	60.0
Henri Bendel (The Limited Inc., Columbus, OH) (1 spec. store) Will be moved to larger quarters on Fifth Avenue by end of 1988.	25.0
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, CA) (1 spec. store)	120.0
Bijan Designers for Men (2 spec. stores)	42.0
Bloomingdale's (Federated Dept. Stores, Cincinnati, OH) (15 dept. stores plus a Home Store in Chestnut Hill, MA: CT 1, FL 2, MD 1, MA 1, NJ 2, NY 4, PA 2, TX 1, VA 1) The 18th store, in Chicago, will open in the Fall, 1988; 19th, in Bloomington, MN in Spring of 1990. Started to open airport gift shops, Bloomies Express, in Nov. 1986.	1,050.0
B. Boman & Co. (19 spec. stores)	30.0
Bonwit Teller (Allied/Campeau, New York, NY) (13 spec. stores) MA 1, NY 3, NJ 1, PA 2, IL 2, MI 1, MO 1, FL 2 The Beverly Hills, CA store was closed Jan. 1987, and the Palm Desert store was sold to Bullocks Willshire (Hooker). A new store is to be opened in Rodeo Drive, Los Angeles.	158.0
Brooks Brothers (Allied/Campeau, New York, NY (57 spec. stores) Including $12.3 million in mail order sales.	231.1
Brooks Fashion Stores (partially owned by Dylex Ltd., Toronto, Canada) (77 spec. stores in the U.S.) In Chapter 11 (Dec. 1987)	412.0
Casual Corner (U.S. Shoe) (3 NYC stores)	6.6
Conway Stores (8 spec. stores)	56.0
Donlevy's (51 spec. stores)	50.0
G & G Shops (Petrie Stores Corp., Secaucus, NJ) (285 G & G and Rave shops throughout the US)	150.0
Getty BFO (7 spec. stores in NY, NJ, CT)	30.0
Goldring (39 spec. stores under various names plus leased depts.)	60.0
Guy LaRoche (15 spec. stores)	16.0

DEPARTMENT/APPAREL SPECIALTY STORES

NORTHEAST

NEW YORK

New York City Area (continued)

	APPROX. SALES (Millions of $)
Honey Bee (Einbender's, St. Joseph, MO) (12 spec. stores)	$ 20.0
Lane Bryant Inc. (The Limited, Columbus, OH) (579 stores)	500.0
Lerner Shops (The Limited Inc., Columbus, OH) (750 stores)	650.0
Loehmann's (May Dept. Stores Co., St. Louis MO) (90 off-price women's spec. stores including 12 opened in 1986) 3 stores were opened in 1987.	351.0
Lord & Taylor (May Dept. Stores Co., St. Louis, MO) (45 stores: CT 2, DC 1, FL 9, GA. 1, IL 7, MD 1, MA 3, MI 4, NJ 2, NY 5, PA 2, TX 7, VA 2) (A store in River Center, San Antonio, TX, is to be opend in the Fall of 1988; also a store in Oak Court Mall, Memphis, TN. In 1990 a store will be opened in Tysons Corner Center McLean, VA. It is expected to do $25 million in the 1st year) Sales of 7 Chicago area stores were reported at $130 million.	865.0
Macy's New York (R.H. Macy, New York, NY) (22 dept. stores: NY 14, CT 2, FL 1, TX 6, plus Furniture Clearance Centers) Sales of Macy's New York in Dallas and in Houston were reported to total $222 million.	not available
Martha's (6 stores in FL, NY, PA)	$ 40.0+
Mays (J.W. Mays Inc., Brooklyn, NY) (3 NY dept. stores)	78.2
Montaldo's (12 spec. stores in CO, MO, NC, OH, VA)	40.0
No Name Stores (Arnold Constable Corp., New York, NY) (44 specialty stores in MI, NJ, OH, PA, VA)	18.0
Norstan Apparel (Artley, Fashion Centers), Long Island City (90 stores)	30.0
Paul Stuart (1 spec. store)	35.0
Phillips-Van Heusen Corp. (128 spec. stores)	133.4
Robbins Men's & Boys' Wear, Long Island City (19 stores)	56.0
Saks Fifth Avenue (BATUS, Inc., New York, NY) (44 spec. stores in AZ, CA, CT, FL, GA, IL, LA, MD, MA, MI, MO, NV, NJ, NY, OH, OK, PA, TX)	1,005.0
Fifth Ave. Flagship stores (to be enlarged)	230.0
3 Chicago stores	70.0
21 Saks Fifth Ave. stores are to be remodeled over the next five years. The South Hampton store is to remain open all year.	
Syms (20 promotional spec. stores)	235.0
Thimbles (BATUS, New York, NY) (46 spec. stores)	25.0
U.S. Factory Outlets Inc. (27 spec. stores)	27.0
Wallachs (Hartmarx, New York, NY) (28 spec. stores)	90.0
Young World Inc. (Suzette Kiddie Togs Inc.) (8 stores)	28.0

DEPARTMENT/APPAREL SPECIALTY STORES

NORTHEAST	APPROX. SALES (Millions of $)
NEW YORK	
Patchogue	
Swezey & Newings, Inc. (3 jr. dept. stores)	$ 28.0
Rochester	
B. Forman & Co. (McCurdy & Co., Rochester, NY) (14 NY spec. stores)	50.0
McCurdy & Co. (7 dept. stores, NY)	65.0
Sibley's (May Department Stores Co., Indianapolis, IN) (13 stores: 7 in Rochester, 4 in Buffalo, 2 in Syracuse)	192.0
Schenectady	
The Carl Co. (7 dept. stores in NY)	30.0
Seaford	
Mid-Island Department Stores Inc. (7 stores)	40.0
South Glens Falls	
Economy Dry Goods (3 Joy Dept. Stores)	45.0
Syracuse	
The Addis Co. (4 NY spec. stores)	10.0
Chappell's Dept. Store (7 NY spec. stores)	40.0
Dey's (Allied/Campeau, New York, NY) (4 NY spec. stores) Downtown Syracuse store was closed in 1987.	36.6
Westbury	
Masters, Inc. (161 spec. stores)	135.0
White Plains	
Steinbach's (29 stores) Acquired by Amcena Corp., New York, NY in 1986 from Supermarkets General and combined with Howland's and Hochschild's. This operation includes 5 former Ohrbach's stores.	170.0
PENNSYLVANIA	
Allentown	
Alice Kay (20 spec. stores)	17.0
Hess's Department Stores, Inc. (Crown American Corp., New York, NY) (41 stores in 1986) In 1987, Hess's had 71 stores in PA, NY, MD, WV, TN, KY, IN, GA. 13 Miller's, Knoxville, TN, with a volume of $107 million were acquired from Allied/Campeau in June 1987. Hess's also acquired Snyders, Louisville, KY. 14 dept. stores with a volume of $55 million. Stores are to be renamed Hess's in Feb. 1988. New stores are to be opened in Asheville, NC and Chesapeake, VA	367.5
H. Leh & Co. (3 PA dept. stores)	23.0

DEPARTMENT/APPAREL SPECIALTY STORES

NORTHEAST

PENNSYLVANIA

	APPROX. SALES (Millions of $)
Aston	
The Dry Goods Inc. (7 dept. stores in DE, NJ, PA)	$ 110.0
Easton	
County Miss Inc. (Hartmarx, New York, NY) (75 spec. stores)	75.0
Orr's Dept. Stores Inc. (5 stores: NJ 3, PA 2)	15.0
Harrisburg	
Pomeroy's (Allied/Campeau, New York, NY) (16 stores after Harrisburg and Levittown, PA divisions were consolidated Jan. 1987) The Wilkes-Barre store was closed and 2 Pomeroy's were sold to Boscov's Ports of the World Div.: Willingboro, NJ; Levittown, PA; and Wilmington, DE to Boscov's. In June 1987, Allied agreed to sell the 12 remaining Pomeroy's to Bon Ton Department Stores, York, PA, a unit of S. Grumbacher & Son, which sold the Lancaster store--a former Gimbels--unit to Boscov.	160.3
Huntingdon Valley	
Artie's Inc. (25 spec. stores)	13.0
Johnstown	
Glosser Bros. Department Store Div. (1 dept. store)	11.0
King of Prussia	
Casual Corner (20 spec. stores)	15.0
Lancaster	
Watt & Shand (2 PA dept. stores)	31.0
Philadelphia	
Boyd's (1 spec. store)	$ 20.0
Deb Shops Inc. (231 women's spec. stores, Northeast and South)	181.0
Constan Inc. (300+ spec. shops under different names)	200.0
Nan Duskin (3 spec. stores)	16.0
Strawbridge & Clothier (12 dept. stores) (Acquired 2 Abraham & Straus stores in 1986: King of Prussia and Willow Grove. Operates discount variety stores, (Clover Stores) which had a 1986 volume estimated at $307 million.	410.0
John Wanamaker (Carter Hawley Hale, Los Angeles, CA) 15 of 16 stores were sold in 1986 to Woodward & Lothrop, Washington DC. However, a price dispute has developed. The flagship store in Philadelphia was sold to a developer, with a longterm lease held by John Wanamaker. In August, Wanamaker sold The Globe store, Scranton, to a local investment group.	not available

DEPARTMENT/APPAREL SPECIALTY STORES

NORTHEAST

	APPROX. SALES (Millions of $)
PENNSYLVANIA (continued)	
Pittsburgh	
Joseph Horne Co. (14 dept. stores, OH 3, PA 11) Sold by May Department Stores Co., St. Louis, MO to a group of investors in Nov. 1986.	$ 228.0
Kaufmann's (May Department Stores Co., St. Louis, MO) (16 dept. stores: OH 5, PA 10, WV 1) Includes Strouss Co. stores merged with Kaufmann's and 3 former Gimbels Midwest Stores which were acquired from Amcena in 1986.	455.0
Quakerstown	
Apparel Affiliates (89 spec. stores)	53.0
Reading	
Boscov's Dept. Stores, Inc. (12 dept. stores: DE 1, NY 1, PA 10) Boscov acquired the Pomeroy's store in Concord Mall, DE, from Allied/Campeau as well as the Lancaster, PA store from Bon Ton, York, PA. Two Pomoroy's were acquired for Boscov's Ports of the World Div. from Allied/Campeau.	287.0
Fashion Flair (Crystal Brands Inc.) 45 spec. stores	40.0
Warrendale	
Fashion Factory (83 spec. stores)	55.0
York	
Bon Ton Dept. Stores (S. Grumbacher & Sons, Inc.) (19 dept. stores in PA, WV, MD, OH, NY, operated under various names) Bon Ton purchased 12 of the Pomeroy's stores, Harrisburg, from Allied/Campeau in 1987, then sold one (Lancaster, PA) to Boscov's.	75.0

MIDWEST

	APPROX. SALES (Millions of $)
ILLINOIS	
Burr Ridge	
Al Baskin (10 spec. stores)	60.0
Chicago Area	
Baskin Clothing Co. (Hartmarx, Chicago, IL) (19 stores)	45.0
Carson Pirie Scott & Co. (Retail Group, total incl. spec. stores)	781.8
20 Department stores (IL 17, IN 3) 301 The County Seat stores had sales of about $300 million in 1986. CPS will open a store in Ridge Mall, Chicago, Aug. 1988 and in Northfield Center, Bradley IL in 1989--a replacement for the Kankakee, IL store. One of Carson's largest stores will open in a former Wieboldt Chicago store in July 1988.	435.0

DEPARTMENT/APPAREL SPECIALTY STORES

MIDWEST	APPROX. SALES (Millions of $)
Chicago Area (continued)	
Baskin Clothing Co. (Hartmarx, Chicago, IL) (19 stores)	$ 45.0
Carson Pirie Scott & Co. (Retail Group, total incl. spec. stores)	781.8
20 Department stores (IL 17, IN 3)	435.0
301 The County Seat stores had sales of about $300 million in 1986. CPS will open a store in Ridge Mall, Chicago, Aug. 1988 and in Northfield Center, Bradley IL in 1989--a replacement for the Kankakee, IL store. One of Carson's largest stores will open in a former Wieboldt Chicago store in July 1988	
Chas. A. Stevens Co. (26 spec. stores)	70.0
Claire's Stores Inc. (463 Claire's Boutiques)	87.0
Evans Inc. (9 stores)	40.0
Goldblatt Bros., Inc. (10 stores: Chicago area 8, IN 2)	41.2
Karolls Men's Fashions (16 stores)	25.0
Lord & Taylor (Lord & Taylor, New York, NY) (7 Chicago area stores)	130.0
I. Magnin (I. Magnin, San Francisco, CA) (3 stores)	50.0
Main Street (Federated Dept. Stores, Cincinnati, OH) (15 stores in IL and MC)	109.3
Marshall Field (BATUS Inc., New York, NY) (25 dept. stores: IL 15, TX 4, WI, 6 incl. 5 former Gimbels Midwest stores in WI)	925.0
(26th store to open Mar. 1989 in Columbus OH. Expected to have a volume of $25-$30 million in the 1st year)	
Montgomery Ward (Mobil Corp.) (295 stores)	4,375.0
Plus 25 liquidation center. Will increase emphasis on opening spec. stores including appliance, etc.	
Neiman-Marcus (Neiman-Marcus, Dallas, TX) (3 Chicago stores)	100.0+
Sears Roebuck & Co. (Domestic Merchandising: 806 general mdse. stores, 261 spec. stores plus catalogs)	22,092.0
Spurgeon Mercantile (83 stores in IL, IN, IA, MN, SD, WI)	73.0
Wieboldt Stores, Inc. (WSI Acquisition Corp.) (13 stores) (Filed Chapter 11 in Sept. 1986)	175.0
Elgin	
Joseph C. Spiess Co. (5 dept. stores)	26.0
River Forest	
Madigan's (5 spec. stores)	35.0
Evansville	
DeJong's (3 spec. stores)	20.0

	APPROX. SALES (Millions of $)
INDIANA (continued)	
Indianapolis	
L.S. Ayres (May Department Stores, New York, NY) (25 dept. stores in IN, KY, OH) (In 1987 May sold 5 L.S. Ayres stores to Snyders Inc., Louisville, KY. Prior to the completion of this sale, however Hess's, Allentown, PA acquired Ayers and Snyders. The two operations were combined into Snyder's, Louisville, KY. Plans were also underway for May to sell one Ayres store to Burlington Coat Factory and one to a developer, Rouse Co., leaving 18 Ayres in operation)	$ 440.0
Block's (Allied Stores/Campeau, New York) (10 stores: IN 8, OH 2) (In April 1987, Block's was sold to Federated Dept. Stores and combined with 2 Herpolsheimer, Grand Rapids, MI stores. Projected total sales for year 1987 of the combined operation: $104.6 million. The downtown Indianapolis Block's, in Southern Plaza, was closed Jan. 1987)	92.0
Paul Harris Stores (296 spec. stores) (70 new stores to be opened in 1987. Paul Harris also operates 32 free standing Pasta stores and 30 Clothes Out Junction stores)	161.0
Harry Levinson, Inc. (11 spec. stores)	14.0
L. Strauss & Co. (6 spec. stores)	12.0

Three Lazarus Dept. Stores in Indianapolis were sold by Federated to Montgomery Ward in 1987.

IOWA	
Cedar Rapids	
Armstrong's (2 IA dept. stores)	20.0
Davenport	
Petersen-Harned-V[illegible]aur, Inc. (9 dept. stores: IL 1, IA 8)	50.0+
Des Moines	
Younkers Inc. (Equitable of Iowa Companies, Des Moines, IA) (26 dept. stores: IL 1, IA 21, MN 1, NV 2, SD 1) (Younkers opened 2 replacement stores in 1986: Sioux City and Cedar Rapids, IA. Will buy 11 dept. stores owned by J.L. Brandeis & Sons, Omaha, to bring the total to 37 stores with volume projected to about $300 million in 1987)	194.3

DEPARTMENT/APPAREL SPECIALTY STORES

MIDWEST

	APPROX. SALES (Millions of $)
KANSAS	
Kansas City (See MISSOURI)	
Lenexa	
Woolf Brothers Inc. (6 spec. stores)	$ 38.0
Parsons	
Litwin's Inc. (14 stores in KS, OK, IN)	15.0
Wichita	
Henry's Inc. (2 spec. stores)	16.0
Shepler's Inc. (8 spec. stores in CO, KS, OK, TX)	75.0
MICHIGAN	
Detroit	
Anton's (Hartmarx, New York, NY) (9 stores)	15.0
Crowley, (Oakland Holding Co.) (12 jr. dept. stores in MI)	113.0
United Shirt Distributors Inc. (31 spec. stores)	13.0
Grand Rapids	
Gantos (55 spec. stores in CT, IL, IN, MD, MA, MN, MI OH, PA, VA, WI)	75.0
Herpolsheimer's (Merged into Block's by Allied/Campeau, then entire operation was sold to Federated to be merged with Lazarus Stores. (See INDIANAPOLIS listing.) (2 stores)	8.0
Paul Steketee & Sons (6 gen. mdse. stores in MI)	29.7
Jackson	
Jacobsons Stores Inc. (20 dept. stores: FL 9, MI 10, OH 1)	308.5
Kalamazoo	
Gilmore Brothers, Inc. (4 gen. mdse. stores)	12.0
Redwood & Ross Co. (20 spec. stores in IL, IN, MI, WI)	16.0
Livonia	
Hadley Arden Inc. (19 spec. stores)	11.0
Mason	
Dancer's Fashions (29 spec. stores in MI, OH)	14.5
Pontiac	
Alvins (15 spec. stores in GA, MI)	16.0
Saginaw	
Town & Country Fashions Inc. (19 spec. stores)	17.0
Troy	
Designer Depot (78 spec. stores) (Divested by Kmart Co., Troy, MI at end of 1986)	200.0

DEPARTMENT/APPAREL SPECIALTY STORES

MIDWEST	APPROX. SALES (Millions of $)
MINNESOTA	
Duluth	
Glass Block Stores (Part of Hennessey's, Billings, MT owned by Mercantile Stores, New York, NY) (1 dept. store)	$ 20.0
Eden Prairie	
Braun's Fashions Inc. (106 spec. stores: Brauns, G'Charles, Gigi, Masseys)	50.0
Lake Elmo	
Connco (25 spec. stores)	16.0
Minneapolis	
Donaldson's (Allied/Campeau, New York (15 stores: IA 2, MN 13) Sold to Carson Pirie Scott, Chicago, in 1987, and integrated into Carson's Chicago headquarters)	189.5
Lancer Stores (33 spec. stores)	15.0
Midwest Stores (300 spec. stores)	19.0
St. Cloud	
G.R. Herberger's (31 dept stores: MN 12, MT 4, NV 5, ND 4, SD 2, WI 3, WY 1)	100.0
MISSOURI	
Joplin	
Newman's Mercantile Co. (6 spec. stores: KS 2, MO 2, OK 2) (KS and OK stores are to be closed in 1988)	25.0
Kansas City	
Halls/Swansons (Hallmark Cards, Inc.) (3 stores)	33.0
Jack Henry Clothing (Hartmarx Corp., Chicago, IL)	15.0
The Jones Store (Mercantile Stores, New York, NY)(9 dept. stores) (Including 2 former Dillard stores acquired in 1986)	220.0
St. Louis	
Dillard Dept. Stores-St. Louis Div. (Dillard Dept. Stores, Little Rock, AR) (24 storee: IL 1, KS 5, MO 18)	not available
Edison Apparel (Edison Bros. Stores, St. Louis, MO) (1,072 stores)	334.0
Famous-Barr (May Dept. Stores Co., St. Louis, MO) (18 dept. stores: MO 13, IL 5)	495.0
Flagship store, St. Louis, MO	60.0+
Gold's Dept. Stores Inc. (Interco Inc., St. Louis, MO) (9 stores: MO 8, IL 1)	17.0
May Department Stores Co. (259 stores)	6,503.0
Worth Stores Corp. (150 spec. stores)	40.0
Springfield	
Heer's (Allied/Campeau Stores Corp., New York, NY) (2 MI dept. stores sold to a management group in 1987)	10.0

DEPARTMENT/APPAREL SPECIALTY STORES

MIDWEST	APPROX. SALES (Millions of $)
NEBRASKA	
Kearney	
Brass Buckle (42 spec. stores in AR, IA, KS, MO, NE, OK))	$ 30.0
Lincoln	
Miller & Paine Inc. (3 Nebraska stores)	10.0
Omaha	
Jerry Leonard Inc. (Allied/Campeau Stores Corp., New York, NY) (26 spec. stores in CO, MN, MS, NE, ND, TX)	17.0
Richman-Gordman Stores, Inc. (12 gen. mdse. stores: IA 4, KS 2, NE 6)	199.0
OHIO	
Akron	
M. O'Neil Co. (May Dept. Stores, St. Louis, MO) (9 Ohio stores)	182.0
Ashtabula	
Carlisle's Retailers Inc. (10 spec. stores in OH, PA)	40.0
Bowling Green	
Fred W. Uhlman & Co. (32 spec. stores in OH, IN, MI)	50.0
Cincinnati	
Brendamour's (19 spec. stores in IN, KY, OH)	16.0
Federated Department Stores, Inc. (260 dept. stores)	6,974.3
Giddings Jenny (B. Miller Inc.)(3 spec. stores: IN 1, KY 1, OH 1)	15.0
Lazarus Dept. Stores (Federated Dept. Stores, Cincinnati) (32 stores in OH, IN, KY, WV including Shillito and Rike's, Cincinnati stores acquired in 1986 and merged into Lazarus) In 1987, Lazarus acquired from Allied/Campeau 10 Block's, Indianapolis stores and 2 Herpolsheimer, Grand Rapids, MI stores, merged into the Lazarus operation. 3 Indianapolis stores were sold to Montgomery Ward. The combined volume of the former Block's and Herpolsheimer stores in 1987 is estimated at $104.6 million.	904.7
McAlpin Co. (Mercantile Stores, New York, NY) (9 stores OH, KY)	335.0
Cleveland	
The Higbee Co. (Brierley Investments Ltd., New Zealand) (15 stores: Cleveland: 7 full-line dept. stores, 3 spec. dept. stores, 1 jr.'s/young men's apparel store, 1 home store; Akron. 2 spec. dept. stores; Canton: 1 full-line dept. store) A Cincinnati full-line dept. store will be opened in 1988. In Dec. 1987 sale of Higbee's to Dillard Dept. Stores and the Edward J. DiBartolo Corp. was announced.	299.8
The May Co., Cleveland (May Department Stores, St. Louis, MO) (10 dept. stores in Ohio, 8 of which are in Greater Cleveland)	248.0
Kline Brothers (24 spec. stores in 12 states plus 1 Katz dept. store, Stillwater, OK)	75.0

DEPARTMENT/APPAREL SPECIALTY STORES

	APPROX. SALES (Millions of $)
MIDWEST	
OHIO (continued)	
Columbus	
Schottenstein Stores Corp. (3 Schottensteins in Columbus plus Gimbels, Pittsburgh) Operates or invests in some 700 retail stores plus apparel manufacturing operations with total volume estimated at over $350 million.	$ 40.0
Dayton	
Elder-Beerman Stores Corp. (26 dept. stores in OH and IN) Also operates 102 Margo's spec.stores. Company plans to go private.	285.0
Toledo	
Lion Dry Goods (Mercantile Stores Co., New York NY)	120.0
Youngstown	
Strouss (merged with Kaufmann's in 1986. See Pittsburgh listing)	
WISCONSIN	
Brookfield	
Kohl's Department Stores (BATUS Inc., New York, NY and other owners) (40 dept. stores: IL 5, IN 11, WI 24)	360.0
Green Bay	
Prange's (H.C. Prange Co., Sheboygan, WI) (21 dept. stores: IL 2, MI 2, WI 17)	162.0
Milwaukee	
P.A. Bergner (31 stores incl. 8 The Boston Stores: IL 24, WI 7) The Boston Stores are former Gimbels-Midwest units acauired from BATUS. (The remainder were either closed or sold to Marshall Field)	352.0
J.L. Marcus (2 spec. stores)	10.0
SOUTH	
ALABAMA	
Anniston	
Kitchin's (6 spec. stores)	15.0
Wakefield's (5 spec. stores)	28.0
Birmingham	
Parisian Inc. (14 spec. stores) (In 1987 2 stores were opened: Chattanooga and Pensacola. In 1988, stores will be opened in Sarasota and in Montgomery) 13 Home Store departments were closed in 1987. In Aug. 1987, Hooker Corp., Australia, agreed to participate in the purchase of the Parisian Inc. along with a group of Parisian shareholders.	226.4
Pizitz: See McRae's. Jackson, MS	
Yeildings (6 spec. stores in AL)	25.0
Gadsden	
Belk-Hudson (Belk Stores Services, Charlotte, NC) (8 stores)	25.0

DEPARTMENT/APPAREL SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
ALABAMA (continued)	
Mobile	
C.J. Gayfer & Co., Springdale Plaza (Mercantile Stores, New York, NY) (12 dept. stores: AL 3, FL 6, MS 3)	$ 350.0
Montgomery	
Gayfers/Montgomery Fair (Mercantile Stores, New York, NY) (6 dept. stores: AL 4, GA 2)	175.0
ARKANSAS	
Little Rock	
M. M. Cohn (10 spec. stores in AR, OK, TN)	50.0
Designs Inc. (29 spec. stores) (Planned to open 16 to 20 in 1987)	28.5
Dillard Dept. Stores-Little Rock Div. (Dillard Dept. Stores, Inc., Little Rock, AR) (26 stores: AR 7, LA 6, TN 7, TX 5)	not available
Dillard Dept. Stores, Inc., Little Rock, (138 stores in 5 divisions)	1,851.4
DISTRICT OF COLUMBIA (Also see listings in Virginia and Maryland)	
Garfinckel's (Allied/Campeau, New York, NY) (10 spec. stores: DC 2, MD 3, VA 5)	117.6
Sold by Campeau to Raleigh's, Washington, DC in 1987 Washington, DC Flagship Store	28.9
Plymouth Shops (Allied/Campeau, New York, NY) (49 spec. stores) (Sold in 1987 to Tribeca Holdings to be combined with Lamston's, Washington, DC)	61.2
Raleighs (10 spec. stores in DC, MD, VA) Purchased Garfinckels from Allied/Campeau in 1987.	75.0
Woodward & Lothrop (Taubman Holdings, Detroit, MI) (15 dept. stores: DC 1, MD 10, VA 4, plus a Clearance Store) (The downtown store was reopened in Oct. 1986 after renovation. It is expected to generate a volume of $80 million in its first year. In 1986 Woodward & Lothrop acquired John Wanamakers, Philadelphia, from Carter Hawley Hale, bringing the combined total to 32 stores with volume over $1 billion in 1987.)	496.7
Esprit, Georgetown, Washington, DC opened a store Aug. 1987. Expect to reach $4.5 million in the first year.	
FLORIDA	
Jacksonville	
May-Cohen's (May Dept. Stores, St. Louis, MO) (5 dept. stores)	80.0
The Vogue Shops, Inc. (180 spec. stores in the South)	85.0
Miami-Palm Beach-Fort Lauderdale Area	
Baron's, Miami (13 spec. stores)	17.5
Burdine's (Federated Dept. Stores, Cincinnati, OH) (29 dept. stores in FL)	809.7
Claire's Stores Inc., Miami (439 spec. stores)	87.2
JByron's Department Stores, Miami (Amcena, New York, N.Y.) (17 dept. stores in FL)	220.0

DEPARTMENT/APPAREL SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
FLORIDA	
Miami-Palm Beach-Fort Lauderdale Area (continued)	
Jordan Marsh, Miami (Allied/Campeau, New York, NY) The 17 Jordan Marsh stores, with an estimated volume of $270 million in 1987 were merged with Maas Brothers, Tampa, FL., Jan. 1987.	$ 270.0
Lansons Inc., North Miami Beach (10 spec. stores in FL)	28.0
Sara Fredericks, Palm Beach (Hutzler Bros., Townson, MD) (8 spec. stores in FL, MA, NY)	15.0
Surreys of Florida Inc., Miami (20 spec. stores)	16.0
Mount Dora	
His Stores For Men (26 spec. stores)	17.5
Tampa-St. Petersburg	
Bentain Inc., Tampa (14 spec. stores)	11.0
Maas Brothers, Tampa (Allied/Campeau, New York, NY) (20 dept. stores incl. 2 Levy's of Savannah, GA store merged with Maas in 1986) Est. vol. 1987:	350.0
Robinson's of Florida (May Dept. Stores Co., St. Louis, MO) (4 dept. stores in Tampa-St. Petersburg, 3 in Orlando, 1 each in Sarasota, Fort Myers and Naples. In 1987 Robinson's of Florida was sold to Maison Blanche-Goudchaux, Baton Rouge, LA. Name change will be phased in but will be called Robinson's/Maison Blanche until this occurs)	136.0
Winter Park	
Ivey's-Florida (BATUS Inc., New York, NY) (12 dept. stores in FL) (This operation was consolidated with Ivey's-Carolinas in 1987, with headquarters in Charlotte, NC)	120.0
GEORGIA	
Albany	
Belk's Dept. Store (Belk Stores Services, Charlotee, NC) (4 GA stores)	13.0
Atlanta	
H. Kessler & Co. (6 GA stores plus wholesale operation)	16.0
Macy's-Atlanta (R.H. Macy & Co. Inc., New York, NY) (16 stores: AL 1, GA 13, LA 1, SC 1) A store in New Orleans was opened Oct. 1986 which was expected to reach a volume of $45 million in its first year A Riverchase Mall, Birmingham, AL store was opened March 1987.	605.0
George Muse Clothing Co. (7 spec. stores)	18.0
Rich's (Federated Dept. Stores, Cincinnati, OH) (20 dept. stores: AL 2, GA 15, SC 2, plus Outlet Home Store, Atlanta) Opened in 1986 were an Atlanta headquarter store in Riverchase Galleria, Birmingham; Town Center, Kennesaw, GA and an Atlanta furniture sotre. Rich's discount operation -- 31 Richway stores -- was merged into the 45-store Gold Circle operation, Columbus, OH in Jan. 1986.	690.6

DEPARTMENT/APPAREL SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
GEORGIA	
Atlanta (continued)	
J. Riggings (U.S. Shoe Corp., Cincinnati, OH) (218 young men's apparel spec. stores) Sold in 1986 to Edison Bros. Stores. Headquarters to be moved to St. Louis.	$ 90.0
Upton's (11 stores: GA 7, TN 3, NC 1) Will open 2 stores in Fall 1987. Plans to buy 8-unit Meyers-Arnold, Greenville, SC chain which has a volume of about $26 million.	26.0
Augusta	
J.B. White & Co. (Mercantile Stores, New York, NY) (6 dept. stores: GA 2, SC 4 plus a furniture store)	145.0
LaGrange	
Mansour's, Inc. (2 jr. dept. stores in GA)	20.0
Norcross	
Hartmarx Specialty Stores Inc. (230 spec. stores)	415.1
Kuppenheimer (Hartmarx Specialty Stores, Inc. Norcross, GA) (210 spec. stores)	160.0
KENTUCKY	
Lexington	
Dawahares of Lexington, Inc. (22 spec. stores)	40.0
McAlpin Co. (Mercantile Stores Co., New York, NY) (2 jr. dept. stores)	20.0
Louisville	
Bacon's (J. Bacon & Son Co.) (Mercantile Stores, New York, NY) (6 dept. stores: IN 1, KY 5)	150.0
BATUS, Inc. (50 dept. stores, 90 spec. stores, 57 home furnishings stores. Two dept. store divisions: Ivey's, Charlotte, NC and Marshall Field, Chicago, IL)	not available
Behr Stores (34 spec. stores in the South)	23.0
Fashion Shop (5 spec. stores)	18.0
Rodes-Rapier Co. (4 spec. stores in KY)	10.0
Snyder's Inc. (9 dept. stores: KY 7, TN 1, IN 1) (Agreed to buy 5 L.S. Ayers KY stores from May Dept. Stores Co., Oct. 1987. Both Snyder's and the 5 Ayres stores were, however, acquried by Hess's Department Stores, Allentown, PA in Oct. 1987)	50.0
LOUISIANA	
Alexandria	
Wellan's (3 gen. mdse. stores in LA) Also owns Palais Royal, Shreveport, LA	13.0

SOUTH	APPROX. SALES (Millions of $)
LOUISIANA	
Baton Rouge	
Maison Blanche/Goudchaux (7 dept. stores in LA) Acquired 10 Robinson's of Florida stores, with a volume of $136 million from May Dept. Stores Co. in 1987. Combined volume for 1988 estimated at $336 million.	$ 224.1
Harahan	
Wiener Enterprises, Inc. (Apparel Division) (116 spec. stores in South)	30.0
Lafayette	
Abdalla's Lafayette (6 spec. stores)	18.0
Minden	
West & Co. of LA (14 gen. mdse. stores in AR, LA, MS plus 7 discount centers)	30.0
New Orleans	
D.H. Holmes Co. (19 dept. stores: AL 1, FL 1, LA 15, MS 2)	270.4
Krauss Co., Ltd. (1 dept. store)	24.0
(Macy's Atlanta opened its first of two planned stores in New Orleans in Oct. 1986, which is expected to do a volume of $45 million in its 1st year. The second store is under construction)	
Shreveport	
Beall-Ladyman (62 spec. stores in AL, AR, KS, LA, MS, MO)	95.0
Selber Brothers (5 spec. stores)	25.0
MARYLAND	
Baltimore	
Joseph A. Bank Clothiers, Inc. (34 spec. stores plus mail order)	136.0
L. Epstein & Sons (10 jr. dept. stores in MD)	40.0
Hamburger's/Kennedy's/Harris & Frank (40 spec. stores in CA, DE, MD, MA, PA, RI)	60.0
Webster Men's Wear (108 spec. stores)	48.3
Frederick	
Routzahns & Sons Inc. (7 spec. stores)	10.0
Townson	
Hutzler's (10 dept. stores in MD) (Inner Harbor, Baltimore store was closed Dec. 1986) The flagship store in Towson is to be rennovated. Hutzler also owns 8 Sara Fredericks stores in NJ, FL, MA and 6 designer stores in FL and the East Coast, which have a volume of about $15 million.	104.0
Pasadena	
Tylers (9 spec. stores in MD, PA)	10.0

DEPARTMENT/APPAREL SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
MISSISSIPPI	
Canton	
Thomas-Walker-Lacey (43 spec. stores in AL, LA, MS)	$ 20.0
Jackson	
McRae's, Inc. (15 dept. stores: FL 1, MS 12, LA 1, AL 1) Acquired 16 Pizitz, Birmingham, AL, stores in Dec. 1986. These stores will be named McRaes. 29-store total:	350.0
NORTH CAROLINA	
Charlotte	
Casual Corner (13 spec. stores) Acquired by U.S. Shoe to be integrated in their Casual Corner chain.	7.0
Belk Stores Services Inc. (350 Belk and Leggett stores)	3,000.0
Ivey's (Batus Inc., New York, NY) (13 stores)	155.0
(In 1987 BATUS consolidated Ivey's-Carolinas and Ivey's-Florida's 12 stores with a volume estimated at $120 million, for a combined total of about $275 million)	
Fayetteville	
Belk-Hensdale Dept. Stores (Belk Stores Services Inc., Charlotte, NC) (13 stores in NC)	13.0
Greensboro	
Rolane Corp. (Kayser-Roth Hosiery, Greensboro, NC) (40 spec. stores)	27.8
Hendersonville	
World of Clothing Inc. (1 spec store)	20.0
North Wilkesboro	
N.B. Smithey Co. (11 NC spec. stores)	14.0
Rocky Mount	
Belk Stores (Belk Stores Services Co., Charlotte, NC) (16 stores)	75.0
OKLAHOMA	
Oklahoma City	
C.R. Anthony (C.R. Anthony Holding Co./Citicorp Venture Capital Ltd.) (268 general mds. stores)	411.3
3 Beall Bros. 3, Jacksonville, TX may be acquired and merged with C.R. Anthony, but will operate as a separate entity.	
Rothschild's (4 spec. stores)	20.0
Streets (11 spec. stores)	24.0
Tulsa	
Renberg's (4 spec. stores)	25.0
The Vandever Co. (The Dunlap Co., Fort Worth) (2 OK spec. stores)	11.0

DEPARTMENT/APPAREL SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
SOUTH CAROLINA	
Easley	
Garrett's (7 spec. stores)	$ 10.0
Florence	
Tomlinson Stores, Inc.	11.0
Gaffney	
Hamrick's Inc. (8 spec. stores)	50.0
Greenville	
Baby Superstores Inc. (20 spec. stores in AL, FL, GA, NC, SC, VA)	12.0
Meyers-Arnold Co. (8 dept. stores: GA 2, NC 1, SC 5) (To be sold to Upton's, Atlanta, GA)	26.0
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (5 dept. stores in TN) Flagship store in Knoxville is being enlarged.	43.6
Athens	
Goody's Family Clothing (65 spec. stores in the South)	150.0
Chattanooga	
Loveman's (6 dept. stores: TN 5, GA 1)	37.5
The Leader Inc. (3 spec. stores)	20.0
Hess's, Allentown, PA will open a Hess's Dept. store in Chattanooga in the Fall of 1988-which is expected to have a volume of $20 million in the first year.	
Clarksville	
Parks-Belk Co. (Belk Store Services, Charlotte, NC) (5 dept. stores)	25.0
Knoxville	
Hunter Haig, Inc. (26 spec stores operating under various names)	35.0
Millers (Allied/Campeau, New York, NY) (12 stores in TN, VA, GA) Sold May 1987 to Hess's, Allentown, PA. Expected to reach a volume of $115 million in 1987. Store to open in Chattanooga, as noted above, but all Miller's stores will be renamed Hess's on Feb. 1, 1988.	107.2
Memphis	
Goldsmith's (Federated Dept. Stores, Cincinnati, OH) (6 dept. stores in TN)	174.0
Oak Hall (2 spec. stores)	10.0
Lord & Taylor plans to open a store in Oak Court Mall, Memphis in the Fall, 1988.	
Nashville	
Cain-Sloan (Allied/Campeau, New York, NY) (4 dept. stores in TN) (Sold to Dillard Dept Stores, Little Rock, AK)	67.4
The Castner Knott Dry Goods Co. (Mercantile Stores, New York, NY) (11 dept. stores: AL 3, KY 1, TN 7)	225.0
The Harvey Co. (9 jr. dept. stores: KY 1, TN 8)	35.0

DEPARTMENT/APPAREL SPECIALTY STORES

SOUTH

TEXAS	APPROX. SALES (Millions of $)
Austin	
Scarbrough's (3 dept. stores in TX)	$ 20.0
Dallas	
Colbert's Inc. (10 spec. stores)	20.0
Joske's (Allied/Campeau, New York, NY) (27 dept. stores in TX)	365.2
(All stores except downtown store were sold to Dillard's in 1987, two of which may be sold to Foley's)	
Downtown Dallas stores	6.1
Sunrise Mall, Corpus Christie	16.4
Ingram Park Mall, Beaumont	12.4
Macy's (R.H. Macy, New York, NY) (2 dept. stores)	120.0
Dallas Galleria	56.0
Margo's (Elder-Beerman Stores Corp., Dayton, OH) (102 stores)	60.0
Neiman-Marcus Group (spun off by Carter Hawley Hale to General Cinema. In a restructuring, the Group includes Bergdorf Goodman, Contempo Casuals, Neiman Marcus)	
Neiman-Marcus (22 spec stores: CA 5, DC 1, FL 2, GA 1, IL 3, MA 1, MO 1, NV 1, NY 1, TX 6)	850.0
A mail order center is to be opened in Dallas in 1988.	
Sanger-Harris--Merged with Foley's, Houston in Jan. 1987. Headquarters are in Houston. See Houston.	
Fort Worth	
Dillard Dept. Stores, Fort Worth Div. (Dillard Dept. Stores, Little Rock, AR) (40 dept. stores: KS 4, OK 15, TX 21)	not available
The Dunlap Co. (31 jr. dept. stores under various names in NM, TX, incl. Striplings & Co.'s 8 stores with a volume of $35.0)	125.0
Monnig's Dept. Stores Inc. (9 dept. stores in TX)	48.0
Pace, Newsom & Moates Inc. (37 jr. dept. stores in TX)	38.0
Southern Fashions (5 spec. stores)	10.0
Houston	
Abercrombie & Fitch (Oshman's, Houston, TX) (27 spec. stores)	48.0
Craig Stores of Texas (Craigs and Buelow Stores) (20 spec. stores)	40.0
Foley's (Federated Dept. Stores, Cincinnati, OH) Sanger Harris, Dallas, was merged into Foley's January 1987, with headquarter in Houston. 2 of 3 former Sanger Harris stores in Houston will be closed. (37 stores after the merger: TX 33, OK 2, AZ 1, NM 1)	1,107.0
It has been reported that 2 former Joske stores in Dallas would be sold by Dillard Dept. Stores to Foley's. A store was opened March 1987 in Corpus Christie.	
Leopold Price & Rolle (Hartmarx Corp., Chicago, IL) (14 spec. stores)	18.2
The Men's Wearhouse (35 spec. stores)	25.0
Norton-Ditto (2 spec. stores)	14.0
Palais Royal Inc. (27 spec stores) (A Corpus Christie store was opened in 1987)	130.0

	APPROX. SALES (Millions of $)
SOUTH	
TEXAS	
Houston (continued)	
Sakowitz (4 stores in Houston)	$ 30.0
(The Hooker Corp. Ltd., Melbourne, Australia, will acquire Sakowitz pending approval by the Federal Bankruptcy Court)	
Walter Pyes Men's & Women's Shops (6 spec. stores)	20.0
Jacksonville	
Beall's (3 Beall's Brother's 3, Inc., Jacksonville) (150 specialty stores)	325.0
(May be acquired by Citicorp Venture Capital Ltd.)	
Laredo	
Hachar's Department Store (4 jr. dept. stores)	58.0
Joe Brand Inc. (6 spec. stores)	25.0
McAllen	
Jones & Jones (3 spec. stores)	18.0
San Antonio	
Dillard's Dept. Stores, San Antonio Div. (Dillard Dept. Stores, Little Rock, AR) (29 dept. stores in TX)	not available
Frost Brothers (Wyly Collection, New York, NY) (10 spec. stores in Texas)	110.0
Sold to Wyly by Manhattan Industries, NY in 1986)	
LaFeria Dept. Store (4 stores in San Antonio plus 2 Leeds spec. stores)	15.0
Sola Serve Corporation (16 spec. stores in AL, LA, TX)	70.0
(Marshall Field opened a second store in San Antonio in 1986)	
Waco	
R.E. Cox Co. (1 spec. store)	11.5
Leon's Fashions, Inc. (40 spec. stores and leased departments)	30.0
T-Shirts Plus (175 spec. stores)	15.0
WEST	
CALIFORNIA	
Anaheim	
The Clothestime (298 junior wear spec. stores in 16 states)	160.7
Bakersfield	
Brock's (The Malcom Brock Co.) (2 stores)	20.0
Sold to Gottschalk's, Fresno, in 1987. A store will be opened in East Bakersfied in Oct. 1988.	
Carson	
The Boston Stores, Inc. (15 spec. stores: AR 3, CA 12)	33.0
Castro Valley	
Daughtrey's Dept Stores (3 jr. dept. stores)	15.0
Fresno	
Gottschalk's Inc. (10 dept. stores in CA, incl. The Fair. Also operates Bobbie West and Petites West specialty stores)	125.9
A Stockton, CA store was opened Nov. 1987; a Palmdale, CA store will be opened in 1989. Gottschalk's acquired Brock's dept. stores, Bakersfield, in 1987.	

DEPARTMENT/APPAREL SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Haywood	
Mervyn's (Dayton-Hudson Corp., Minneapolis, MN) (188 stores)	$ 2,862.3
Irvine	
The Wet Seal (Dylex Ltd., Toronto, Canada) (27 spec. stores)	18.0
Los Angeles/Long Beach Area (Southern California)	
Bonwit Teller (Bonwit Teller, New York, NY)	10.0
Wilshire Blvd. (closed Jan. 1987. Palm Desert store sold to Federated. Plans are underway to open a store on Rodeo Drive)	
The Broadway (Carter, Hawley Hale, Los Angeles) (43 CA dept. stores, a warehouse and clearance center)	1,045.0
Southern California total	565.1
Downtown Plaza	30.9
Anaheim	19.1
Bakersfield	19.1
Beverly Center	30.5
Brea Park	26.4
Carlsbad	17.4
Carson	16.0
Century City	27.0
Cerritos	28.0
Chula Vista	22.0
Crenshaw	14.4
Del Amo	43.4
Downey	23.2
Escondido (opened Feb. 1986)	19.7
Fashion Valley	32.0
Fox Hills	25.8
Glendale Galleria	48.0
Grossmont	22.0
Hawthorne	15.6
Horton Plaza	12.4
Huntington Beach	29.4
LaJolla	21.0
Laguna Hills	29.8
Long Beach	19.0
Newport Beach	24.4
Northridge	30.0
Orange	26.5
Panorama City	25.7
Pasadena	18.7
Puente Hills	21.7
Riverside	18.7
San Bernardino	19.6
Santa Anita	32.0
Santa Monica	29.6
Sherman Oaks	31.0
South Coast Plaza, Costa Mesa (new Flagship store opened Nov. 1986. Expect a volume of $35 million in 1st year)	12.4
Thousand Oaks	21.4
Topanga Plaza	28.3
Ventura	23.0
West Covina	23.1
Westchester	10.9
Whittier	16.0

(continued)

CALIFORNIA

Los Angeles/Long Beach Area (Southern California) (continued)

	APPROX. SALES (Millions of $)
Buffum's Inc., Long Beach (16 Jr. dept. stores and spec. stores. La Canada store opened in 1986; Solano Beach, Oct. 1987. Sale of Buffum's may be pending).	$ 115.0
Bullock's Southern California, including Bullock's Willshire (Federated Department Stores, Cincinnati, OH) (22 dept. stores: AR 1, CA 20, NV 1; 7 Bullock's Wilshire spec. stores in CA)	751.8
Bullock's department stores, Southern California	550.0
Beverly Center	37.0
Carlsbad	14.9
Century City	260.0
Citicorp Plaza (downtown L.A. stores opened Aug. 1987)	9.0
Del Amo	36.0
Grossmont	15.0
LaHabra	15.8
Lakewood	25.1
Manhattan Beach	19.7
Mission Valley	25.9
Mission Viego	18.5
Northridge	28.1
Palm Desert	20.5
Pasadena	45.0
Santa Ana	27.0
Sherman Oaks	55.5
South Coast Plaza, Costa Mesa	53.0
Thousand Oaks	17.0
West Covina	17.2
Westwood	44.0
Other Bullock's department stores:	
Las Vegas, NV	23.3
Scottsdale, AR	28.0
Bullock's Wilshire (6 spec. stores)	96.3
Wilshire Blvd.	37.0
LaJolla	10.0
Newport Beach	15.3
Palm Springs	8.0
Palos Verdes	11.0
Woodland Hills	15.0

Bullock's Wilshire catalog sales are estimated at $10 million in 1986. In March 1987, Bullock's launched a new specialty store division, Bullock's Woman--specializing in large sizes. The first of a planned 13-store chain was opened in Las Vegas; a second store was opened in September in Palm Desert. A Bullock's department store will be opened in the Denver, CO Galleria in 1990.

(continued)

DEPARTMENT/APPAREL SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Los Angeles/Long Beach Area (Southern California) (continued)	
Carter Hawley Hale Stores Inc. (114 dept stores with volume estimated at $2.6 billion, 188 spec. stores)	$ 4,089.8
I. Magnin (I. Magnin, San Francisco, CA) 9 Southern California stores, excl. Santa Ana, which was closed Feb. 1987.	98.0
May Company California (May Dept. Stores Co., St. Louis, MO)	
Southern California (36 stores)	788.9
Arcadia	18.2
Bonita	18.1
Brea	23.9
Buena Park	19.5
Carlsbad	20.3
The City (Orange)	17.1
Citicorp Plaza (opened 3/86)	8.9
Crenshaw	12.6
Eagle Rock	27.0
Eastland	21.0
El Cajon	19.0
Escondido (North County Fair (opened 1986)	18.3
Fox Hills	20.1
Galleria at South Bay	43.0
LaJolla	13.4
Lakewood	31.2
Laurel Plaza	40.1
Mission Viego	24.7
Montclair	20.3
Montecello (opened 1986)	16.4
Oxnard	15.5
Palm Desert	22.4
Palos Verdes	12.3
Pasadena	6.5
Riverside	17.7
San Bernardino	15.6
San Diego	31.8
Sherman Oaks	17.4
South Coast Plaza, Costa Mesa	44.4
Thousand Oaks	23.3
Topanga Plaza, Canoga Park	31.7
West Los Angeles	33.2
Westminister	29.7
Whittier	11.0
Wilshire Blvd.	31.9

May Co. California closed three stores in 1986.

(continued)

DEPARTMENT/APPAREL SPECIALTY STORES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (Southern California) (continued)

	APPROX. SALES (Millions of $)
Mervyn's (Dayton, Hudson Corp., Minneapolis, MN) (44 stores in Southern CA)	$ 550.0
Neiman Marcus (Neiman Marcus, Dallas, TX) (3 CA stores)	98.0
Beverly Hills	60.0
Fashion Island, Newport Beach	23.0
Fashion Valley, San Diego	15.0
Nordstrom (Nordstrom Inc., Seattle, WA) (12 Southern CA spec. stores)	600.0
Fashion Valley, San Diego	58.0
South Coast Plaza, Costa Mesa	100.0
West Side Pavilion	63.0

Nordstrom opened stores in Montclair and in Escondido in 1986, and enlarged the Costa Mesa, CA store. In 1987, stores were opened in San Jose (Feb.) and in Santa Ana (Sept.) and there are plans to open in Santa Barbara and in Riverside, also 2 stores in Sacramento. The Palm Springs store was closed in March 1987.

Roberts Dept. Stores (11 spec. stores)	13.0
J.W. Robinson (May Dept. Stores, St. Louis) formerly owned by Associated Dry Goods) (24 dept. stores in CA)	586.0
Downtown Los Angeles	26.6
Anaheim	15.1
Beverly Hills	44.1
Cerritos	24.5
Del Amo	31.5
Glendale	22.4
Horton Plaza	11.0
Mission Viejo	16.2
Newport Beach	43.8
Palm Springs (closed Mar. 1987)	4.9
Panorama City (San Fernando Valley)	12.3
Pasadena	23.2
Puente Hills	23.9
San Diego (Fashion Valley)	25.6
Santa Anita	19.8
Santa Barbara	39.0
Santa Monica	31.0
Sherman Oaks	17.5
South Coast Plaza, Costa Mesa (opened Nov. 1986)	13.0
Thousand Oaks	22.4
University Towne Center	20.4
Westminster	23.7
Woodland Hills	36.4

DEPARTMENT/APPAREL SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Los Angeles/Long Beach Area (Southern California) (continued)	
[illegible].W. Robinson opened a store in the North County Fair, Escondido, CA in 1986; also a store in Costa Mesa--a replacement for the Palm Springs store. Costa Mesa is expected to reach a volume of $20 million in its 1st year. Palm Desert, Town Center store was opened Mar. 1987.	
Saks Fifth Avenue (Saks Fifth Avenue, New York, NY) (6 Southern CA stores)	$ 95.5
Beverly Hills	37.0
South Coast Plaza	18.5
Mission Valley	12.0
Woodland Hills	17.5
La Jolla and Palm Springs	10.0
Sacramento	
Weinstock's (Carter Hawley Hale, Los Angeles, CA) (12 dept. stores: CA 8, NV 1, UT 3)	236.0
San Bernadino	
Harris (Corte Ingles Elsa) (6 gen. mdse. stores in CA)	75.0
San Diego (See Los Angeles listings)	
San Francisco/Oakland/Palo Alto	
Aca Joes (111 licensed and company-owned stores)	23.0
Emporium Capwell (Carter Hawley Hale, Los Angeles, CA (22 dept. stores in CA)	710.0
Macy's California (R.H. Macy, New York, NY) (24 dept. stores in CA and one in Reno, NV)	1,340.6
I. Magnin San Francisco, CA (Federated Dept. Stores, Cincinnati, OH) (26 spec. stores: AR 1, CA 19, IL 3, MD 1, OR 1, WA 1)	317.1
(Santa Ana store was closed in Feb. 1987)	
Wilkes Bashford, San Francisco (1 spec. store)	14.0
San Jose	
Riley's Dept. Store, Inc. (4 jr. dept. stores in CA)	10.0
Santa Cruz	
Samuel Leask & Sons (4 jr. dept. stores)	10.0
Santa Monica	
H.C. Henshey Co. (2 jr. dept. stores)	10.0
Santa Rosa	
Rosenberg's (1 spec. store)	18.0

DEPARTMENT/APPAREL SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Watsonville	
Charles Ford Co. (7 dept. stores)	$ 30.0
Whittier	
Hinshaw's Dept. Stores, Inc. (2 dept. stores)	20.0
COLORADO	
Denver	
May Department Stores Co., (St. Louis, MO) acquired the Denver--a 12 unit dept. store operation with sales in 1986 at $151 million. In 1987, May sold 2 stores to Penney--South Glenn and South Center, and 3 to Mervyn's--Colorado Springs, Ft. Collins, Pueblo, CO. 4 stores were converted to May D&F units--Cinderella City, North Glenn, Cherry Creek, and Aurora--the latter combined with an existing May store. Lakeside was closed, and the downtown The Denver is to be sold to a developer.	
May D&F (May Dept. Stores Co., St. Louis) had 11 dept. stores in 1986 with a volume estimated at $175.0. As noted above, some units which were formerly The Denver stores were added to May D&F operations, bringing their total to 14 stores. Combined total:	326.0
(2 Broadway Southwest stores in Denver--Villa Italia--and Cinderella City--were sold by Carter Hawley Hale to May Dept. Stores, and a Westminster Mall, Denver store sale to Montgomery Ward is pending.)	
Englewood	
Joslins (Mercantile Stores, New York, NY) (11 dept stores: CO 10, WY 1)	215.0
HAWAII	
Honolulu	
Liberty House (Amfact Retail Div., San Francisco, CA) (9 dept. stores plus 30 resort/specialty shops)	220.0
MONTANA	
Billings	
Hart Albin Co. (1 dept store plus spec. stores)	12.0
The Hennessy Co. (3 dept. stores plus deLendrecie's, Fargo, ND Duluth Glass Block Stores, Duluth, MN)	80.0
OREGON	
Portland	
Meier & Frank (May Dept. Stores Co., St. Louis, Mo) (8 dept. stores: Or 7, WA 1)	226.0

DEPARTMENT/APPAREL SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
UTAH	
Salt Lake City	
ZCMI Department Store (Zion's Cooperative Mercantile Assoc.) (10 dept. stores: ID 2, UT 8)	$ 177.2
WASHINGTON	
Redmond	
Eddie Bauer Inc. (939 stores plus catalog)	250.0
Seattle	
Bon Marche (formerly The Bon) (Allied/Campeau, New York, NY) (40 stores incl. 3 Home stores in ID, MT. OR, UT, WA	535.0
Downtown Seattle)	50.0
(6 Puget Sound area stores are to be renovated)	
Frederick & Nelson (Sold by BATUS to F&N Acquisition Corp. in Sept. 1986) (8 stores: OR 2, WA 5, plus a budget outlet)	220.0
(7 spec. stores operating as Lyman's will be opened by F&N in Seattle & Portland in 1987, 1st year volume expected to reach $30-$50 million)	
Tri-North Dept. Stores, Inc. (28 dept. stores under various names in OR and WA)	20.0
Nordstrom Inc. (65 stores in CA, WA, OR, MT, VT, HA, AL)	1,629.9
Spokane	
The Crescent (sold by BATUS to F&N Acquisition Corp., Seattle) (3 Spokane dept. stores)	55.0

SCHEDULE OF ADDITIONAL FACT FILES

THE CHILDREN'S MARKET: INFANTS', TODDLERS', GIRLS' AND BOYS' (APPAREL, PLAYTHINGS & RELATED PRODUCTS: Includes a detailed statistical profile of the U.S. industry, i.e. number and size of manufacturers, production and shipments, employment trends and more. Also details imports and exports by product. At the retail level, this Fact File covers sales estimates, information on leading outlet types and on consumer price trends. The size of the growing potential market in terms of population counts and birth projections is outlined as well as consumer preferences and buying patterns in the consumer market.

CONSUMER MARKET DEVELOPMENTS: An overview of all facets of the consumer market. Within the framework of population and income groups, the markets for children's products, for young adults and for the mature are defined in terms of numbers and buying power. Trends and projections are included as well as an analysis of developments that are shaping the U.S. consumer market -- living arrangements, households, working women, marriage and birth rates, etc. Trends in personal consumption expenditures are also covered.

DEPARTMENT STORE AND SPECIALTY STORE SALES (1987 Edition): Updates information in the 1986 Edition on department and apparel specialty store sales (not including discount operation) for stores (buying headquarter locations) listed by state within the four major geographical regions of the U.S. Information on the number of stores in operation is included, as well as on plans to open stores, if available. Available data on sales of branch stores is included. Additional features include: An alphabetical listing of major national chains in the general merchandise and apparel store classifications with the latest available sales figures; a listing and sales figures for traditional department stores which have sales volumes published, or estimated, of $50 million or more in 1986; a list of conglomerates operating traditional department and apparel stores, including the names and locations of these stores.

DRESSES & CAREER APPAREL (WOMEN'S, MISSES' AND JUNIORS'): At the manufacturer level, provides a statistical profile of the dress industry and the products made within this industry, including dresses, career apparel, pants dresses, ensembles, etc. Includes number and size of manufacturers, production and value of shipments, industry location and trends in employment levels. Analyzed is the growing impact of imports on total growth in the size of the consumer market, based on population counts, working women by type of occupation, and more.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Covers developments in the U.S. industry, in imports and in retail sales for fashion accessories, including small leather goods, handbags, millinery, scarves, gloves, belts, jewelry, sunglasses, watches, etc. to the extent that statistical information is available. Included are production and shipments by U.S. manufacturers plus the quantity and value of imports in recent periods. Retail sales and operating results in department and specialty stores are reported, as well as summaries of available studies on consumer buying preferences.

FOOTWEAR (MEN'S, WOMEN'S, BOYS', GIRLS') (1987 Edition): Updates the 1986 edition with figures on U.S. manufacturers production and shipments by type of footwear. Also detailed statistics on imports and their impact on total U.S. market supply. Analyses industry trends and performance of major resources and retailers. Spotlights developments in the athletic footwear industry and consumer market. At the retail level, information is included on sales trends and merchandising results for shoe stores and for footwear departments in department stores; as well as consumer purchase patterns.

HOME TEXTILES & RELATED PRODUCTS: Includes the latest statistics on the U.S. industry, including manufacturers wide variety of products -- bed linens, towels, blankets, comforters, slip covers, pillows, curtains/draperies and hardware, shades, and blinds. Covers the changing competitive nature of the industry through acquisitions of major producers and through consolidation of buying power at the retail level. Includes information on production, shipments and retail sales.

HOSIERY/LEGWEAR/BODYWEAR (MEN'S, WOMEN'S, BOYS', GIRLS'): A comprehensive report on mills making hosiery and related products, including production and shipments, fiber consumption, producer price trends. The growing trend in imports is also covered. At the consumer level, the size of the potential market is measured in terms of population counts and projections and estimates are included on retail sales of major products by type of retail outlet.

HOUSEHOLD APPLIANCES, ELECTRIC HOUSEWARES, HOME ENTERTAINMENT PRODUCTS: Covers a broad range of products included in these three classifications at the manufacturer and at the retail level. Provides a statistical profile of the U.S. industry in terms of number of manufacturers, production, shipments, exports. Imports are detailed, as well as information on export markets. Covers retail sales and merchandising results and information on appliance/radio/TV stores.

HOUSEHOLD FURNITURE AND BEDDING: Provides an overall view of market trends in the U.S. For the U.S. industry, the report covers statistics on manufacturers, on production and shipments in terms of quantity and value by type of furniture. Trends in the concentration levels in the U.S. industry are reported, as well as in employment and earnings in the industry. Also included is information on the industry in leading states. Consumer market information includes data on characteristics of new housing units (number of rooms); also trends in consumer expenditures for furniture, sales by type of outlet. Details on furniture stores, including the 25 leaders, are also covered.

MEN'S FURNISHINGS AND WORK/CAREER APPAREL: Provides a summary of major market trends in men's shirts, (dress and sport), underwear, nightwear, robes, hosiery and headwear, as well as the growing market for work/career apparel. These products are covered at the U.S. industry level, including production and shipments, employment trends and manufacturer concentration levels. Imports are detailed by product in terms of quantity and value, as well as exports. Data at the retail level includes sales and operating results in men's furnishings in department and specialty stores. The potential market for work/career apparel is defined in data on trends in employment of men by occupation.

MEN'S SPORTSWEAR, CASUALWEAR, OUTERWEAR: The wide variety of men's wear items included are covered from available statistical information on the industry at the manufacturer, retailer and consumer levels. Included is information on production and shipments by domestic producers, imports and exports. The retail market is covered in sales estimates and data on major outlet types, as well as studies of consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES; RAINWEAR: Covers information on the fast-growing category, tailored (but unstructured) separates for men, as well as suits, jackets and coats made in the men's clothing industry, plus rainwear. U.S. industry data includes trends in the number of manufacturers, production and value of shipments, location of the industry and employment trends. Foreign trade is examined, including export and import developments. The U.S. consumer market is defined in terms of number in the population by age and by population groups. A look is taken at the Young Men's market and merchandising practices of stores to reach this market. Departmental merchandising and operating results in department stores and in men's wear stores are covered.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS (A Fact File Special Edition): Covers details on U.S. manufacturers in the sporting goods/athletic goods industry, concentrating on products sold through retail outlets such as sporting goods stores and general merchandise stores, as well as functional athletic footwear and apparel. Includes quantity and value of shipments of specific products; concentration of shipments among leading manufacturers, and trends in producer prices. Imports of specified sporting and athletic goods are covered. At the consumer level, data includes statistics on sports participation levels and purchases of specific sports equipment. Also buying habits in relation to activewear and sports equipment.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING (A Fact File Special Edition): A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Percentage distributions have been calculated for firms and outlet types, including single and multi-unit operations, sales concentration and geographical distribution, with comparisons with 1977 census findings where possible.

TABLETOP & GIFTWARES: Statistics included for these industries include those on both the manufacturing and retailing levels. There's coverage of production and shipments; foreign trade; retail sales; plus data on the consumer market including buying habits and expenditures.

THE TEXTILE/APPAREL INDUSTRIES: Provides an overview of the U.S. textile and apparel industries, their current problems and programs to improve their competitive position in the U.S. market and abroad. Covers a statistical profile of each industry in terms of number of manufacturers, concentration levels, production and shipments, including exports. Trends in imports in terms of quantity and value are detailed. Also included is information on plant and equipment expenditures and on mill machinery in place in U.S. mills.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry, leading manufacturers, sales of products for both men and women, trends in industry employment and earnings, advertising expenditures, foreign trade. Consumer expenditures by product are detailed, as well as retail sales by outlet type, and consumer buying patterns and usage in regard to specific products.

WOMEN'S COATS, SUITS, RAINWEAR, AND FURS: Data from the domestic industry includes the number of manufacturers, industry concentration levels, trends in employment and earnings, production and value of shipments, including exports. Import trends and impact on U.S. market supply are analyzed. At the retail level, information includes consumer price trends, the size of the potential market and outlook for growth in terms of population by age group and employment trends among women. Also covers sales estimates and operating results in department and specialty store.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR: An analysis of statistical information available on the industry and market, from manufacturer through to consumer. Includes the latest available data on U.S. production, shipments and exports; and details on imports. Retail sales and operating results in department and specialty stores are covered, as well as trends in producer and consumer prices. Developments in the size of the consumer market and trends in the market are summarized.

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Audrey S. Balchen, Director

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CONSUMER MARKET DEVELOPMENTS

Table of Contents

TRENDS... 1
POPULATION TRENDS.. 3
TOTAL U.S. POPULATION.. 3
    RESIDENT POPULATION BY AGE GROUPS............................ 4
    AGE STRUCTURE: TOTAL POPULATION OF THE U.S. 5
    POPULATION PROJECTIONS BY AGE................................ 6
    POPULATION PROJECTIONS....................................... 8
    SEX RATIOS...10
    RACE/COLOR...10
    THE HISPANIC POPULATION......................................10
    ASIANS & OTHER...11
    REGIONS, DIVISIONS, STATES...................................12
    METROPOLITAN AREAS...16
    MIGRATION/MOBILITY PATTERNS..................................17
MARITAL STATUS/MARRIAGES...20
    MARRIAGES..20
    DIVORCES...24
HOUSEHOLD/FAMILIES...24
    GEOGRAPHIC DISTRIBUTION......................................29
    PROJECTIONS..31
LIVING ARRANGEMENTS..31
    YOUNG ADULTS...31
    AGES 25-64 YEARS...32
    THE ELDERLY..33
    CHILDREN...34
FERTILITY/BIRTHS...35
    BIRTH ORDER..38
    SEX RATIO IN BIRTHS..39
    BIRTH PATTERNS BY MONTH......................................39
    AGE OF FATHER..40
    REGIONAL VARIATIONS IN BIRTH TOTALS..........................40
CHILD CARE ARRANGEMENTS/SCHOOL ENROLLMENT.........................41
    PREPRIMARY SCHOOL..42
    ELEMENTARY SCHOOL & HIGH SCHOOL..............................42
    COLLEGE ENROLLMENT...44
EDUCATIONAL ATTAINMENT...45
LABOR FORCE, EMPLOYMENT, EARNINGS................................46
    THE LABOR FORCE..47
    CURRENT EMPLOYMENT...51
    ANNUAL AVERAGES..52
    EARNINGS...57
    EMPLOYMENT STATUS OF FAMILIES................................58
INCOME/WEALTH..60
    PERSONAL INCOME/OUTLAYS......................................60
    UNREPORTED INCOME..60
    PROVERTY STATUS..61
    PERSONAL INCOME/OUTLAYS PROFILE..............................61
    PER CAPITA INCOME..62
    MONEY INCOME OF INDIVIDUALS..................................63
    THE WEALTHIEST INDIVIDUALS...................................65
    HOUSEHOLD INCOME...66
    STATUS OF CHILDREN...67
    INCOME DISTRIBUTION..68
CREDIT/DEBT/PAYMENTS...70
CONSUMER PRICES..71
CONSUMER SPENDING..71
    PERSONAL CONSUMPTION EXPENDITURES BY SELECTED PRODUCT CATEGORIES: 1983-1986...72
    HOUSING SALES/OWNERSHIP......................................74
SCHEDULE OF ADDITIONAL FACT FILES................................75

CONSUMER MARKET DEVELOPMENTS

TRENDS

Consumer spending accounts for some two-thirds of economic activity in the U.S. At the onset of 1988, economists and marketers were still nervously studying American consumers to try to assess the psychological and real impact of the October 1987 stock market crash on purchasing plans. The continuing volatility of the stock market was not reassuring. However, according to the president's task force on the October 19th crash, three quarters of Americans do not directly own any stock, and just 10% account for 90% of all stock holdings. Both major indexes of consumer attitudes -- The Conference Board's and the University of Michigan's -- posted gains after the close of the year.

A slowdown in growth of income, including wages and salaries, and in consumer spending had preceded the market crash. In 1987 real average earnings were 2% below their level in 1977. In the fourth quarter of 1987, disposable income, after adjustment for inflation and taxes, rose only 2% above the final 1986 quarter. This compares with a 3.6% gain the previous year, and it was the lowest rise since 1982.

Consumers were on a spending spree from 1983 up to 1987, with real spending rising about 4.5% a year. In 1987, real spending increased only 0.6% and showed progressive softness, particularly in goods. Savings rates have been very low in recent years, and consumers are faced with debts to be paid and savings to be rebuilt. The job outlook remains sluggish, although it may improve along with exports. Over the past 12 months, merchandise exports rose 19% while imports increased 5%.

Imports remain a major share of consumer goods, however, as well as machinery, parts, supplies, etc., used by domestic manufacturers. Imports' share of all goods sold last quarter of 1987 rose to 11.6%, according to the Commerce Department.

A change in the trade deficit, however, implies belt-tightening on the part of consumers. It means a substantial investment in plant and equipment which implies at least a temporary rise in savings and a reduction in consumer spending. The outlook is for an increase in exports but not a reduction in imports in the immediate future -- only a lowering of the rate of growth. With the lower value of the dollar, the price of imported goods rises -- and domestic manufacturers follow in the wake, raising their prices. This brings up the inflation rate, and the rise is not being matched by an equivalent increase in wages and salaries. This adds up to a drop in buying power.

An advance preliminary report on retail sales by outlet type, issued by the Census Bureau, showed a 3.6% rise for the year 1987 compared with 1986, in terms of current dollars. Higher prices accounted for some of the above-average gains noted in sales of eating/drinking places, drug stores, general merchandise and apparel stores, auto sales were weak.

Estimated Retail Sales: 1987 & Percent Change: 1987/1986
(Sales in millions of dollars)

Kind of Business	1987 Sales	% Change 1987/1986
Retail trade, total	$1,507,134	+ 3.6%
Durable goods, total	583,404	+ 2.7
Building materials, hardware, etc.	90,583	+ 2.8
Automotive dealers, supply stores, etc.	340,434	+ 1.4
Furniture, home furnishings & equip. stores	80,782	+ 2.9
Nondurable goods, total	923,730	+ 4.2
General merchandise group stores	164,788	+ 6.1
Department stores	140,548	+ 6.6
Food Stores	302,887	+ 2.3
Gasoline service stations	89,500	+ 3.3
Apparel & accessory stores	85,241	+ 5.5
Eating & drinking places	152,918	+ 5.5
Drug & proprietary stores	53,031	+ 7.5
Liquor stores	19,315	- 2.4
Nonstore retailers	27,378	+ 2.4
Mail order houses (dept. store merchandise)*	3,190	- 4.7

* Includes businesses selling merchandise through coin-operated vending machines, by house-to-house canvass and from mail order.

Source: U.S. Bureau of the Census:
Monthly Retail Trade (BR-87-12)

The Reagan administration's budget is based on sustained economic expansion but at a significantly lower rate in 1988, with GNP growth (covering the value of the country's entire output of goods and services) placed at an inflation-adjusted rate of 2.4% from the 3.8% growth in 1987. The pace of economic activity is expected to pick up in the second half of the year. The inflation rate in the fourth quarter of 1988, as measured by the Consumer Price Index, is projected to 4.3% compared with 4.6% in the fourth quarter of 1987. The jobless rate is expected to hold at the fourth quarter - 5.8%. At the onset of the year, however, the expectations of many economists were less optimistic than the administration's projections.

POPULATION TRENDS

Total U.S. Population

The Census Bureau regularly reports three sets of population counts for the U.S.: (1) the total including Armed Forces Overseas; (2) the resident population of the nation; (3) the civilian population. At the beginning of each year, a special release is issued on the size of the resident population and growth patterns in the past year.

As of January 1, 1988, 244.4 million people were living in the U.S. This represented a gain of only 0.9% during the year 1987, marking the fifth consecutive year that annual growth has been less than 1%. The rate of growth was the slowest since the late 1930s. The annual rate of increase in the peak years of the baby boom (1947-1961) ranged from 1.6% to 1.9%.

Births are the dominant component of population growth, with an estimated 3,772,000 children born in the U.S. last year. That number has changed little in the past five years. Offsetting births were an estimated 2,127,000 deaths, a record. That number has been growing steadily as the U.S. population ages. The Census Bureau believes that 600,000 people immigrated to the U.S. last year, a number that has remained fairly constant for the past five years. Overall, an addition of 2.2 million people to the U.S. population total is anticipated for 1988.

Detailed reports on the population, including age, sex and race, as of mid-year, are issued annually by the Census Bureau, covering the population as of July 1.

Estimates of the Population By Type, as of July 1, 1980-1987
(In thousands)

	Total Population Including Armed Forces Overseas	Resident Population	Civilian Population
1987(p)	243,773	243,249	241,519
1986(r)	241,596	241,078	239,357
1985	239,283	238,741	237,036
1984(r)	237,001	236,477	234,762
1983	234,799	234,284	232,589
1982	232,520	231,996	230,327
1981	230,138	229,637	227,989
1980	227,757	227,255	225,651

(p) preliminary
(r) revised

Source: U.S. Bureau of the Census, Current Population Reports, Population Estimates and Projections
(Series P-25, No. 1014, issued November 1987)

POPULATION TRENDS

Resident Population Age Groups

Resident U.S. Population By Age, Sex & Race: 1980, 1986
(Numbers in thousands)

	Total					
July 1, 1986	Total	Male	Female	White	Black & Other Races	Black
All ages	241,078	117,360	123,718	204,301	36,777	29,306
Under 5 years	18,128	9,274	8,854	14,675	3,453	2,721
5 to 9 years	17,291	8,851	8,440	13,976	3,315	2,673
10 to 14 years	16,564	8,487	8,077	13,341	3,223	2,591
15 to 19 years	18,610	9,483	9,128	15,206	3,404	2,785
20 to 24 years	20,417	10,232	10,185	16,946	3,471	2,813
25 to 29 years	22,010	11,026	10,984	18,498	3,512	2,795
30 to 34 years	20,774	10,367	10,407	17,549	3,225	2,491
35 to 39 years	18,723	9,256	9,467	16,060	2,663	2,036
40 to 44 years	14,346	7,030	7,316	12,409	1,936	1,463
45 to 49 years	11,927	5,817	6,110	10,274	1,653	1,282
50 to 54 years	10,887	5,260	5,627	9,429	1,458	1,157
55 to 59 years	11,268	5,359	5,909	9,901	1,367	1,108
60 to 64 years	10,962	5,097	5,865	9,740	1,222	998
65 years & over	29,173	11,823	17,350	26,297	2,875	2,395

	Total					
July 1, 1980	Total	Male	Female	White	Black & Other Races	Black
All ages	227,255	110,427	116,828	195,208	32,047	26,784
Under 5 years	16,458	8,417	8,040	13,493	2,964	2,476
5 to 9 years	16,609	8,495	8,114	13,622	2,987	2,506
10 to 14 years	18,236	9,314	8,923	15,085	3,151	2,685
15 to 19 years	21,380	10,700	10,680	18,112	3,268	2,757
20 to 24 years	20,767	10,147	10,620	17,647	3,120	2,629
25 to 29 years	19,697	9,801	9,896	16,798	2,899	2,365
30 to 34 years	17,754	8,780	8,974	15,313	2,441	1,929
35 to 39 years	14,980	6,921	7,159	12,219	1,861	1,478
40 to 44 years	11,726	5,738	5,988	10,156	1,570	1,265
45 to 49 years	11,048	5,371	5,677	9,649	1,399	1,150
50 to 54 years	11,698	5,618	6,080	10,344	1,355	1,136
55 to 59 years	11,616	5,480	6,136	10,387	1,229	1,046
60 to 64 years	10,145	4,700	5,446	9,128	1,017	878
65 years & over	25,704	10,366	15,338	23,297	2,407	2,106
Median age: Years						
1986	31.8	30.6	33.0	32.7	27.2	26.9
1980	30.0	28.9	31.3	30.9	25.3	24.9

Source: U.S. Bureau of the Census, Current Population Reports: Estimates of the Population of the U.S., By Age, Sex, and Race: 1980-1986 (Series P-25, 1000)

POPULATION TRENDS

Age Structure: Total Population of the U.S.

The population wave generated in the baby boom era, which reached a total of over four million births a year from 1954 through 1964, has surged through the age scale, cresting now in the young adult market.

Most recent Census Bureau counts record 76.1 million persons (including Armed Forces Overseas) who are 25-44 years of age -- 31.5 % of the total as of July 1986, and 20 % more than the 63.5 million counted in the 1980 Census. The latest figure included 37.9 million males and 38.2 million females. Of the 76.1 million total, 64.7 were White, 11.4 were Black and other races. The 35-to-44 population total grew faster than any other age group (28%) between 1980 and 1986, increasing from 25.7 million to 33.1 million. But they are still outnumbered by the 25-to-34 age group, which increased 15.4%, from 37.3 million to 43 million, and represented almost 18% of the U.S. population in 1986.

There was a 15-year period of decline in births between 1960 and 1975, which is now reflected in lower counts for teenagers and young adults. However, an uptrend in the number of births started in 1986 due to the larger number of women in the childbearing ages rather than to an increase in fertility rates. The birth total has averaged 3.7 million annually for the past four years (compared with an average 3.15 million in 1973-1975) -- still far below the 4.33 million births reported for the year 1957 when births reached a record high, and no significant gain in birth totals can be expected.

The recent upturn in births has resulted in growth in the under 5 population, which increased 10.9% between 1980 and 1986 -- from 16.3 million to 18.1 million. There are now more preschool-aged children than there have been since July 1967, when there were 18.6 million.

The 5-to-13 year old population dropped 2.6% between 1980 and 1986, from 31.2 million to 30.3 million, but is now gaining and should continue to grow for the short-term future. The number of 14-to-17 year olds dropped by 8.9% between 1980 and 1986, from 16.2 million to 14.8 million, while the number of 18-to-24 year olds declined from 30.3 million to 28.0 million, or by 7.6%. Both of these age groups will continue to shrink in size in the near future, as noted in the section covering Population Projections.

The number aged 45 to 54 years held at about 22.8 million in both 1980 and 1986, but the older population is growing. Those in the 55-to-64 group grew by 2.4%, from 21.7 million to 22.2 million. The 65-and-over population has increased substantially, and will continue to grow in the foreseeable future. Those aged 65 to 74 increased 11.2%, reaching 17.3 million versus 15.6 million. The population 75 to 84 years of age reached 9.1 million in 1986 versus 7.7 million in 1980 for a gain of 17.1%. The latest count showed 2.8 million persons 85 years and over versus 2.2 million. The aging of the population is reflected in the median age, which was 31.8 in 1986 versus 30 years in 1980.

POPULATION TRENDS

Age Structure: Total Population of the U.S.

Total Population by Age Groups--July 1, 1980, 1986
(Including Armed Forces Overseas)

	Number (thousands) 1986	Percent Distribution 1986	Percent Distribution 1980(r)	Percent Change in Number 1986/1980
All ages	241,596	100.0%	100.0%	+ 6.4%
Under 5 years	18,128	7.5	7.2	+ 10.1
5 to 13 years	30,346	12.6	13.6	- 2.4
14 to 17 years	14,797	6.1	7.1	- 8.8
18 to 24 years	27,793	11.6	13.3	- 7.8
25 to 34 years	42,984	17.8	16.5	+ 14.2
35 to 44 years	33,143	13.7	11.4	+ 28.1
45 to 54 years	22,822	9.4	10.0	+ 0.3
55 to 64 years	22,230	9.2	9.5	+ 2.1
65 to 74 years	17,325	7.2	6.9	+ 10.7
75 to 84 years	9,051	3.7	3.4	+ 16.3
85 years & over	2,796	1.2	1.0	+ 23.2

(r) revised

Source: U.S. Bureau of the Census,
Current Population Reports (Series P-25, 985)

Population Projections By Age

Census Bureau projections on the size of the total population, including Armed Forces overseas, by single years of age, sex, and race, for the years 1983 through 2080, were last published in 1984. The report included three series of projections, each based on different assumptions as to future growth in fertility, mortality and net immigration. The "middle" of the three series has proved to be fairly close to reality thus far, and this series has been drawn upon in this report.

The rate of population growth in the 1980's (0.92% per year) has been less than in any decade since the 1930's (when it was 0.70% per year). Based on middle projections, growth averaging 0.78% annually is anticipated in the period 1990-1995, and will then continue to drop to reach an annual growth of 0.01% in the period 2050-2080.

The aging of the population, which as been underway as previously noted, is a major trend noted in the projections. In 1982, the median age of the population was reported at 30.6 years, which up to that time was the highest level ever reached. The Census Bureau does not anticipate a figure this low based on any assumptions regarding the future population. As of July 1988, the median age of the population is estimated at 32.3 years. By 1995, the middle series of projections places the median at 34.7 years; by year 2000, at 36.3 years, by 2020, at 39.3 years.

POPULATION TRENDS

Population Projections By Age

It is significant that the ratio of the working-age population (age 18 to 64) to the retirement age population is declining. In 1980, there were an estimated 5.2 persons of working age for everyone age 65 and older; currently there are 4.9, and this figure is expected to drop to 4.7 by the year 2000, then to 2.7 by 2030; to 2.4 by 2080. This holds important implications for the future profile of the labor force, for productivity and for incomes.

The pattern in growth in future years will be determined primarily by the pattern in births. The key through the early part of the next decade is the cohort represented by the baby boomers (born in the period 1946 through 1964 with a peak in 1957), who now range in age from 24 to 42. This group represents key opportunities for marketers as they represent young adults in household-formation years, and those who have advanced in affluence and needs, and are ready for second homes and all that goes with upgrading life styles.

The 15-year decline in births between 1960 and 1975 will be reflected in population declines in specific age groups in the future, as will the pick-up in birth totals in the past 11 years.

The following table summarizes population counts by age groups, based on the middle series of projections, for 1988, 1995, and 2005. Better nutrition and health care means people live longer. The elderly population age 85 and over is expected to increase by about a third by 1995, from 3.0 million to 4.1 million; by year 2005 it will gain another 40% to total 5.7 million.

Registering fastest growth among younger people is the group age 35 to 54 -- expected to increase 24% by 1995, and gain another 12% from 1995 to year 2005. They represent about 24% of the population currently. Their share is expected to rise to about 30% by year 2005.

POPULATION TRENDS

Population Projections

POPULATION PROJECTIONS - 1988, 1995, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1988	1995	2005	1995/1988	1988	1995	2005
MALE							
Total all ages	119,390	126,368	134,297	+ 5.8%	100.0%	100.0%	100.0%
Under 5 years	9,740	9,529	8,931	- 2.1	8.1	7.5	6.6
5 to 9 years	9,197	9,895	9,094	+ 7.6	7.7	7.8	6.8
10 to 15 years	9,940	11,465	11,698	+15.3	8.3	9.1	8.7
16 years & over	90,513	95,482	104,574	+ 5.5	75.8	75.6	77.9
16 - 19	7,474	6,804	8,058	- 9.0	6.3	5.4	6.0
20 - 34	31,625	29,166	27,416	- 7.8	26.5	23.1	20.4
35 - 54	29,134	36,206	40,769	+24.3	24.4	28.6	30.4
55 - 64	10,079	9,865	14,060	- 2.1	8.4	7.8	10.5
65 & over	12,201	13,441	14,271	+10.1	10.2	10.6	10.6
75 & over	4,516	5,360	6,390	+18.7	3.8	4.2	4.8
85 & over	851	1,122	1,560	+31.8	0.7	0.9	1.2
Median age (years)	31.1	33.4	36.0	--	--	--	--
FEMALE							
Total all ages	125,911	133,191	141,381	+ 5.7%	100.0%	100.0%	100.0%
Under 5 years	9,289	9,086	8,518	- 2.2	7.4	6.8	6.0
5 to 9 years	8,786	9,443	8,678	+ 7.5	7.0	7.1	6.1
10 to 15 years	9,500	10,954	11,167	+15.3	7.5	8.2	7.9
16 years & over	98,337	103,710	113,016	+ 5.5	78.1	77.9	80.0
16 - 19	7,161	6,517	7,708	- 9.0	5.7	4.9	5.5
20 - 34	31,141	28,497	26,706	- 8.5	24.7	21.4	18.9
35 - 54	30,236	37,190	41,249	+23.0	24.0	27.9	29.2
55 - 64	11,469	11,059	15,399	- 3.6	9.1	8.3	10.9
65 & over	18,330	20,447	21,954	+11.5	14.6	15.3	15.5
75 & over	8,388	10,026	12,088	+19.5	6.7	7.5	8.5
85 & over	2,197	2,952	4,143	+34.4	1.7	2.2	2.9
Median age (years)	33.6	35.9	39.2	--	--	--	--
TOTAL, MALE & FEMALE							
Total all ages	245,302	259,559	275,677	+ 5.8	100.0%	100.0%	100.0%
Under 5 years	19,029	18,615	17,449	- 2.2	7.7	7.2	6.3
5 to 9 years	17,983	19,338	17,772	+ 7.5	7.3	7.4	6.5
10 to 15 years	19,440	22,419	22,865	+15.3	7.9	8.6	8.3
16 years & over	188,850	199,192	217,591	+ 5.5	77.0	76.7	78.9
16 - 19	14,635	13,321	15,765	- 9.0	6.0	5.1	5.7
20 - 34	62,766	57,663	54,122	- 8.1	25.6	22.2	19.6
35 - 54	59,370	73,396	82,018	+23.6	24.2	28.3	29.7
55 - 64	21,548	20,924	29,459	- 2.9	8.8	8.1	10.7
65 & over	30,531	33,888	36,227	+11.0	12.4	13.0	13.1
75 & over	12,902	15,385	18,479	+19.2	5.3	5.9	6.7
85 & over	3,047	4,074	5,704	+33.7	1.2	1.6	2.1
Median age (years)	32.3	34.7	37.6	--	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports (Series P-25, No. 952) (May 1984)

POPULATION TRENDS

Population Projections (continued)

U.S. Population by Single Years of Age
Infants, Children, Youths & Key Age Groups
Middle Series Projections* - 1988, 1995
(Numbers in thousands)

	Total		Male		Female	
	1988	1995	1988	1995	1988	1995
Total, all ages	245,302	259,559	119,390	126,368	125,911	133,191
Under 5 years	19,029	18,615	9,740	9,529	9,289	9,086
Under 1 year	3,847	3,623	1,970	1,855	1,877	1,768
1 year	3,834	3,673	1,963	1,880	1,871	1,793
2 years	3,814	3,725	1,952	1,907	1,862	1,818
3 years	3,785	3,775	1,937	1,932	1,848	1,843
4 years	3,749	3,819	1,918	1,955	1,830	1,865
5 to 9 years	17,984	19,337	9,197	9,895	8,786	9,443
5 years	3,704	3,853	1,896	1,972	1,809	1,881
6 years	3,669	3,874	1,876	1,982	1,792	1,892
7 years	3,622	3,880	1,853	1,985	1,769	1,895
8 years	3,595	3,874	1,837	1,982	1,758	1,892
9 years	3,394	3,856	1,736	1,973	1,658	1,883
10 to 14 years	16,143	18,772	8,255	9,602	7,887	9,170
10 years	3,265	3,830	1,669	1,960	1,596	1,871
11 years	3,283	3,796	1,679	1,942	1,604	1,854
12 years	3,180	3,753	1,626	1,920	1,554	1,833
13 years	3,242	3,719	1,659	1,902	1,583	1,818
14 years	3,173	3,674	1,623	1,879	1,551	1,795
15 to 19 years	17,934	16,968	9,160	8,668	8,774	8,300
15 years	3,299	3,647	1,685	1,863	1,613	1,784
16 year	3,419	3,445	1,747	1,761	1,672	1,684
17 years	3,771	3,316	1,928	1,694	1,843	1,622
18 years	3,772	3,332	1,927	1,702	1,845	1,630
19 years	3,673	3,228	1,872	1,647	1,801	1,581
Key Age Groups						
20 to 24 years	19,338	17,142	9,826	8,723	9,511	8,420
25 to 29 years	22,088	18,822	11,140	9,516	10,948	9,306
30 to 34 years	21,341	21,698	10,659	10,927	10,682	10,771
35 to 39 years	19,124	22,052	9,481	11,007	9,643	11,046
40 to 44 years	16,242	19,945	7,998	9,872	8,245	10,073
45 to 54 years	24,004	31,397	11,655	15,327	12,348	16,071

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-25, No. 952) (May 1984)

POPULATION TRENDS

Sex Ratios

As of mid-1986, the resident U.S. population included 117.4 million males of all ages, 123.7 million females. Up until about age 30, males outnumber females. In 1986, there were 59,874,000 males compared with 57,902,000 females under 31 years of age. Females, however, have a longer life span, on average, and they outnumber males to an increasing extent with advancing age. Among the population age 65 and over, females were almost 60% of the total in 1986. There were about 68 males for every 100 females in this age category. In the total population, there were 95 males for every 100 females.

Males under 18 are in the majority in all states. By ages 18 to 24 women predominate in about half the states. In only five states do males outnumber females in the overall population; Alaska, Hawaii, Nevada, North Dakota and Wyoming.

Race/Color

The non-White population is growing faster than the total population. Between April 1, 1980 and July 1, 1986, Blacks grew by 9.8%, reaching a total of 29.4 million (including Armed Forces overseas). Other races -- a category consisting principally of American Indians, Alaskan natives, Asians and Pacific Islanders -- are increasing at a faster rate (up 45% in 1986 compared with 1980) than either Whites (4.9%) or Blacks (9.8%) While Black growth has been overwhelmingly due to an excess of births over deaths, other-races growth has resulted from relatively high net civilian immigration. However, the total count on "other races" was only 7.5 million in 1986 -- up from 5.3 million in 1980.

Due to a high level of births, the Black population is considerably younger than the White Population, with a median age of 26.9 years in 1986, compared with 32.7 for Whites. Both median ages have been rising and this will continue. By 1990, the median age for Blacks is projected to 27.7 years (versus 33.9 for Whites).

Hispanic Population

In August 1987 the Census Bureau issued an Advance Report in a new series on the Hispanic population of the U.S., using revised estimating procedures which include an allowance for undocumented immigration and for emigration of legal residents.

The civilian, noninstitutional Hispanic population, which includes both the Black and the White races, reached a total of 18.8 million in March 1987, representing a gain of 700,000 (16%) over the March total. The number was 30% higher than in 1980, compared with a gain of 6% in the non-Hispanic population in the same time span. These figures do not include members of the U.S. Armed Forces living outside of the country. Hispanics represented 7.9% of the U.S. population in 1987, up from 6.4% in 1986. Illegals were reported to account for 23% of the increase in the Hispanic population since 1980.

Among Hispanic groups, the highest rate of growth between 1982 and 1987 was noted in the population originating in Central and South America, followed in order by Mexicans, Puerto Ricans and Cubans. Hispanics are ethnically and economically diverse, and the composition of the market is rapidly changing.

Hispanic Population (continued)

Profile of the Hispanic Noninstitutional Population: March 1987 By Origin

	Number (millions)	% of Total With Hispanic Origins	% of U.S. Total	% Increase 1987/1982
Total	18.8	100.0%	7.9%	+22%
Mexican	11.8	62.6	5.0	22
Puerto Rican	2.3	12.2	1.0	11
Central & South American	2.1	11.4	0.9	7
Cuban	1.0	5.4	0.5	40
Other Hispanic *	1.6	8.5	0.7	33

* Includes persons from Spain or those identifying themselves in general terms, such as Hispanic, Spanish, Spanish American, Latino, etc.

Source: U.S. Bureau of the Census, Current Population Reports: The Hispanic Population of the U.S.: March 1986 and 1987 (Advance Report)

Projections on the Hispanic population were compiled by the Census Bureau in 1986. According to the "middle" of three projections based on different assumptions regarding the course of Hispanic fertility, immigration and death rates, the population may reach 19.9 million by 1990, and climb to 25.2 million by the end of this century.

The Hispanic population is generally younger than the White population, but it is aging. From a median age of 24.1 years in 1982, the middles series of projections anticipate a median of 28 years by year 2000, rising to a median age of 31.2 years by 2020, 36.2 by 2050.

Because persons of Mexican origin account for 6 out of 10 of the Hispanic population, there is a concentration of Hispanics in California. According to Sales & Marketing Management (February 1988), as of 1986 there were 2.6 million Hispanics in the Los Angeles area, 1.7 million in the New York area, 744.5 thousand in Miami. The fastest growing Hispanic metropolitan areas from 1981 to 1986 were Riverside-San Bernardino (+35.5%) and San Diego (+26%). The 1988 New York Hispanic Market Study, prepared by Strategy Research Corp., Miami, estimated the Hispanic population in the New York area of dominant influence at 2.5 million in 1988, up 23.6% since 1980 and 2.2% from 1987. Puerto Ricans represent 45.1% of New York's Hispanics, down from 46.8% in 1985. The second largest group is from the Dominican Republic (27.8% of the total). The fastest growth is being registered by Hispanics from Central and South America.

Asians & Other

Asians and Pacific Islanders in the population are increasing even faster than Hispanics. The latest counts on this minority group, from the 1980 Census, totaled about 3.7 million, 142% above the 1970 total. By 1990 people classified as Chinese, Asian, Indian, Japanese, Korean, Filipino, Hawaiian, Pakistanis, etc., are expected to increase to about 5.9 million; by the year 2000, to over 8.0 million.

The Chinese represent the biggest single group of Asian Americans, but they will probably be outnumbered by Filipino Americans by 1990. More than a million Filipinos and Chinese will live in the U.S. by the end of the decade.

POPULATION TRENDS

Regions, Divisions, States

While the resident population of the U.S. was up 7.4% in 1987 compared with 1980 Census counts, there was great variation in geographic trends in population movement. Trends noted in the first half of the 1980's have continued in the second half. The preponderance of growth has been in the South and West. Of the net gain of 16.7 million in the resident population from 1980 to 1987, 15.0 million (90%) was absorbed by the South and the West -- the South accounting for 8.5 million (51% of the total gain), the West, 6.4 million (39%). Declines in energy-related industries, however, have slowed growth in the South and West.

Population Growth By Regions & Divisions of the U.S.
1980, 1986, 1987
(Numbers in thousands)

	Estimated Resident Population July 1 1986	1987	April 1, 1980 (Census)	% Change 1987/1980
United States	243,249	241,096	226,546	+ 7.4%
Northeast	50,278	50,056	49,135	+ 2.3
New England	12,844	12,742	12,348	+ 4.0
Middle Atlantic	37,433	37,313	36,787	+ 1.8
Midwest	59,538	59,292	58,866	+ 1.1
East North Central	41,904	41,722	41,682	+ 0.5
West North Central	17,634	17,569	17,183	+ 2.6
South	83,884	83,003	75,372	+ 11.3
South Atlantic	41,684	40,938	36,959	+ 12.8
East South Central	15,290	15,200	14,666	+ 4.3
West South Central	26,910	26,864	23,743	+ 13.3
West	49,700	48,745	43,172	+ 15.1
Mountain	13,167	12,982	11,373	+ 15.8
Pacific	36,533	35,763	31,800	+ 14.9

Source: U.S. Bureau of the Census: release on P-25 report on Population by States (Dec. 30, 1987)

In the past decade, California added 4.0 million people (for a gain of 17%). The second largest gain was in Texas, at 2.6 million (up 18%), followed by Florida's 2.3 million population increase (+23%). Population growth continued in all of the industrial midwestern states from 1986 to 1987 as their economies continued to recover from the early 1980's. Recurring problems in the farm economy, however, contributed toward another year of losses in Iowa, Nebraska, North Dakota, Montana and Idaho.

Population losses continued in the energy-depressed states of West Virginia, Oklahoma, and Wyoming. Louisiana showed a decline from the previous year's population count for the first time in 1987. Texas grew more slowly than earlier in the decade.

POPULATION TRENDS

Regions, Divisions, States (continued)

All the northeastern states grew from 1986 to 1987, with New Hampshire moving among the nation's 10 fastest growing states. The region's population has increased by 1.1 million (2.3%) since 1980 after losing in the 1970's. Some observers look for a decline in the population of New York due to the impact of the October 1987 market crash, and its long range effect on employment and economic activity in the area.

Resident Population of States, 1980, 1986, 1987
(Numbers in thousands)

	July 1		April 1, 1980	% Change
	1987(p)	1986(r)	(Census)	1987/1980
U.S. Total	243,400	241,096	226,546	+ 7.4%
New England:	12,844	12,742	12,348	+ 4.0
Maine	1,187	1,172	1,125	+ 5.5
New Hampshire	1,057	1,027	921	+ 14.8
Vermont	548	541	511	+ 7.2
Massachusetts	5,855	5,834	5,737	+ 2.1
Rhode Island	986	975	947	+ 4.1
Connecticut	3,211	3,193	3,108	+ 3.3
Middle Atlantic:	37,443	37,313	36,787	+ 1.8
New York	17,825	17,795	17,558	+ 1.5
New Jersey	7,672	7,625	7,365	+ 4.2
Pennsylvania	11,936	11,894	11,865	+ 0.6
East North Central:	41,904	41,722	41,682	+ 0.5
Ohio	10,784	10,748	10,798	- 0.1
Indiana	5,531	5,503	5,490	+ 0.7
Illinois	11,852	11,551	11,427	+ 1.4
Michigan	9,200	9,139	9,262	- 0.7
Wisconsin	4,807	4,783	4,706	+ 2.1
West North Central:	17,634	17,569	17,183	+ 2.6
Minnesota	4,246	4,213	4,076	+ 4.2
Iowa	2,834	2,850	2,914	- 2.7
Missouri	5,103	5,064	4,917	+ 3.8
North Dakota	672	679	653	+ 2.9
South Dakota	709	708	691	+ 2.7
Nebraska	1,594	1,598	1,570	+ 1.6
Kansas	2,476	2,459	2,364	+ 4.7
South Atlantic	41,684	40,938	36,959	+ 12.8
Delaware	644	633	594	+ 8.3
Maryland	4,535	4,461	4,217	+ 7.5
District of Columbia	622	625	638	- 2.6
Virginia	5,904	5,795	5,347	+ 10.4
West Virginia	1,897	1,917	1,950	- 2.7
North Carolina	6,413	6,331	5,882	+ 9.0
South Carolina	3,425	3,381	3,122	+ 9.7
Georgia	6,222	6,100	5,463	+ 13.9
Florida	12,023	11,694	9,746	+ 23.4

POPULATION TRENDS

Regions, Divisions, States (continued)

Resident Population of States, 1980, 1986, 1987
(Numbers in thousands)
(continued)

	July 1		April 1, 1980	% Change
	1987 (p)	1986 (r)	(Census)	1987/1980
East South Central	15,290	15,200	14,666	+ 4.3%
Kentucky	3,727	3,726	3,661	+ 1.8
Tennessee	4,855	4,800	4,591	+ 5.7
Alabama	4,083	4,050	3,894	+ 4.9
Mississippi	2,625	2,624	2,521	+ 4.1
West South Central	26,910	26,864	23,747	+ 13.3
Arkansas	2,388	2,371	2,286	+ 4.5
Louisiana	4,461	4,499	4,206	+ 6.1
Oklahoma	3,272	3,306	3,025	+ 8.2
Texas	16,789	16,689	14,229	+ 18.0
Mountain:	13,167	12,982	11,373	+ 15.8
Montana	809	817	787	+ 2.9
Idaho	998	1,002	944	+ 5.8
Wyoming	490	507	470	+ 4.4
Colorado	3,296	3,266	2,890	+ 14.1
New Mexico	1,500	1,479	1,303	+ 15.1
Arizona	3,386	3,279	2,718	+ 24.6
Utah	1,680	1,664	1,461	+ 15.0
Nevada	1,007	967	800	+ 25.8
Pacific:	36,533	35,763	31,800	+ 14.9
Washington	4,538	4,463	4,132	+ 9.8
Oregon	2,724	2,702	2,633	+ 3.4
California	27,663	27,001	23,668	+ 16.9
Alaska	525	532	402	+ 30.7
Hawaii	1,083	1,065	965	+ 12.2

(p) preliminary
(r) revised

Source: U.S. Bureau of the Census: Advance release, (December 30, 1987)

Regional differences are noted in the age distribution of the resident population. The Northeast has the lowest percentage that are under 15 years of age -- 19.5% vs. 22.7% in the West. On the other hand, the Northeast has the highest percentage of population age 65 and over. This group represents 13.5% of the Northeast's total population; in the West, it accounts for only 10.7%, and 12.0% of the South's total, despite the migration of older people to the Sunbelt. However, of single states Florida has the oldest population (median age: 36.0), and 18% of the State's total are now over 65. The South accounts for almost 34% of all U.S. residents age 65 and older.

Regions, Divisions, States (continued)

Resident Population of Regions By Age: July 1986

	U.S. Total	Northeast	Midwest	South	West
Number (thousands)(r)	241,096	50,056	59,292	83,003	48,745
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Age group:					
Under 5 years	7.6	6.7	7.4	7.7	8.4
5 to 14 years	14.1	12.8	14.4	14.5	14.3
15 to 24 years	16.2	16.2	16.3	16.5	15.7
25 to 34 years	17.8	16.9	17.6	17.6	19.2
35 to 44 years	13.8	13.9	13.3	13.6	14.5
45 to 54 years	9.5	10.0	9.4	9.5	9.1
55 to 64 years	9.3	10.4	9.3	9.0	8.4
65 to 74 years	7.2	8.0	7.3	7.2	6.5
75 & over	5.0	5.5	5.3	4.8	4.2

Source: U.S. Bureau of the Census, Current Population Reports:
State Population & Household Estimates to 1986
(Series P-25, No. 1010 and 1986 revised regional totals)
(December 30, 1987)

The following table shows the percent of the Nation's total population covering each age group accounted for by the four regions.

Distribution of Resident Population in Reported Age Groups By Regions of the U.S.: July 1, 1986

	Under 5 Years	5 to 17 Years	18 to 24 Years	25 to 44 Years	45 to 64 Years	65 & Older	Median Age
U.S. Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	31.7%
Regions							
Northeast	18.5	19.3	20.7	20.2	22.6	23.0	33.5
Midwest	24.2	25.2	24.6	24.1	24.5	25.3	31.6
South	34.8	35.3	35.0	34.1	34.0	33.9	31.4
West	22.4	20.2	19.7	21.6	18.9	17.8	31.0
Total number (thousands)	18,128	45,143	27,739	75,852	45,044	29,173	

Source: U.S. Bureau of the Census,
Current Population Reports (Series P-25, No. 1010)

Regions, Divisions, States (continued)

The age group which is now dominant -- 25 to 44 years -- is concentrated to a large degree in the South, which had 34.1% of the total in 1986. The South Atlantic Region had about half the South's population of this age, and accounted for about 16.8% of the nation's total. The Midwest's East North Central Region, however, had the biggest regional count in this age group -- 12.9 million, or 17.0% of the total.

On a State basis, California showed the greatest concentration of the 25-to-44 age group, with over 9.1 million (12% of the U.S. total) in 1986. New York followed in second place, with 5.432 million (7.2%), closely followed by Texas, with 5.422 million (7.1%).

Metropolitan Areas

In July 1987 the Census Bureau issued an advance release on population in the nation's metropolitan areas as defined by the Office of Management and Budget as of June 30, 1987. The nation's metro area have a total population of nearly 185 million or about 77% of the country's 241 million people. About 38% are concentrated in the 10 largest metro areas.

The Top 10 Consolidated Metropolitan Statistical Areas: July 1, 1986
(Population counts in thousands)

Consolidated Metropolitan Statistical Area	July 1, 1986	April 1, 1980	% Change 1986/1980
NY - Northern NJ - Long Island, NY - NJ - CT	17,967.8	17,539.5	+ 2.4%
Los Angeles-Anaheim-Riverside, CA	13,074.8	11,497.5	+ 13.7
Chicago-Gary-Lake County, IL - IN - WI	8,116.1	7,937.3	+ 2.3
San Francisco-Oakland-San Jose, CA	5,877.8	5,367.9	+ 9.5
Philadelphia-Wilmington-Trenton, PA - NJ - DE - MD	5,832.6	5,680.5	+ 2.7
Detroit-Ann Arbor, MI	4,600.7	4,752.8	- 3.2
Boston-Lawrence-Salem, MA - NH	4,055.7	3,971.8	+ 2.1
Dallas-Fort Worth, TX	3,655.3	2,930.6	+ 24.7
Houston-Galveston-Brazoria, TX	3,634.3	3,099.9	+ 17.2
Washington, D.C. --MD - VA	3,563.0	3,250.9	+ 9.6

Source: Bureau of the Census release, July 24, 1987
(CB87-116)

Metropolitan Areas (continued)

Dallas-Fort Worth's 25% growth was topped among metro areas by Phoenix's 26% gain . Phoenix experienced a growth of more than one million in population. Other fast growing areas of this size group were Atlanta (20%), San Antonio (19%), Tampa-St. Petersburg (19%), San Diego (18%), Sacramento (17%), and Houston (17%). The nation grew by 6.4% in 1986 over 1980.

Smaller areas are growing faster, however. Among the 281 metro areas, regardless of size, population increases of upwards of 30% between 1980 and 1986 were noted for the following:

Naples, FL	(121,400)	+ 41%
Ocala, FL	(171,000)	+ 40
Ft. Myers-Cape Coral, FL	(279,100)	+ 36
Ft. Pierce, FL	(205,600)	+ 36
Austin, TX	(726,400)	+ 35
Anchorage, AK	(235,000)	+ 35
Midland, TX	(111,300)	+ 35
Melbourne,-Titusville, FL	(361,200)	+ 32
West Palm Beach, FL	(775,600)	+ 31

Metro areas that will have the most people in the years ahead, based on projections from the National Planning Association, Washington, D.C., are listed below. Population figures are in millions for cities and surrounding counties:

	1990	2010		1990	2010
Los Angeles-Long Beach	8.4	9.4	Atlanta	2.7	3.4
New York	8.4	9.0	Nassau-Suffolk, NY	2.7	3.0
Chicago	6.2	6.6	San Diego	2.4	2.9
Philadelphia	5.1	5.6	Anaheim-Santa Ana	2.4	2.9
Dallas-Ft. Worth	3.8	4.7	Riverside-San Bernardino	2.2	2.8
Detroit	4.3	4.6	Minneapolis-St. Paul	2.4	2.8
Wash., D.C.-MD-VA	3.7	4.5	Phoenix	2.1	2.7
Houston	3.4	4.3	Baltimore	2.4	2.7
Boston	3.8	4.3	St. Louis	2.4	2.6
San Francisco-Oakland	3.6	4.2	Tampa-St. Petersburg	2.0	2.5
Miami-Ft. Lauderdale	3.1	3.9	Pittsburgh	2.1	2.3

Migration/Mobility Patterns

The movement of consumers involving a change of residence and to some extent affecting the economic/demographic patterns of the country on a regional basis is a significant measurement for marketers. The concentration of the population in the young adult group is reflected in the record level of population mobility at the present time. Rates of geographical mobility are the highest for persons in their twenties and in a report issued by the Census Bureau in December 1987, a record number of Americans changed residences in the March 1984 through March 1985 period.

POPULATION TRENDS

Migration/Mobility Patterns (continued)

The 46.5 million persons -- counting those age 1 year and older -- who changed residences in this period compared with 39 million in the previous 12 months. This was the largest increase in a single year noted since the 1950's.

Two-thirds of all movers, some 30 million, moved within the same county. The remainder was evenly divided between those moving between counties in the same state and those moving between states and from abroad.

Reversing what may have been a short-term aberration reported for the period ending 1984, the West resumed the long term trend in registering a gain in population. The region registered the biggest net gain (surplus of immigrants over outmigrants) of any region, with a total of 260,000 in the 1984-1985 period compared with a net loss of 53,000 reported for the previous 12 months. The South had a net gain of 160,000 (down from the 426,000 net gain in the previous period). Both the Northeast and the Midwest were losers -- off 209,000 and 211,000, respectively, in the 1984-1985 period.

The West had the largest percentage of its population who moved to a different residence during the year -- almost one out of four age 1 and older moved in the 12 months ending March 1985, followed by the South (about 22 percent). The South, with the largest population base, accounted for 37 percent of the U.S. total count of movers.

Life course events contribute to the high geographical mobility of persons in their twenties, and to their changing needs as consumers. Such events as leaving school, entering the labor force, early career mobility, military service, establishing separate households and getting married are factors particularly at the younger end of the scale. With increases in family size and greater affluence young adults represent the group most likely to change residences to meet changing housing needs. In the 1984-1985 period, 17.3 million persons age 20 to 31 years changed residence, representing 35% of the population in this age group. Of those age 32 to 49 years, 8.3 million moved to a different residence (16.6% of the population of this age). Of all persons age 1 year and older, 19.5% moved to a different house in the 12 months ending March 1985.

Selected Characteristics of Persons 1 Year & Older
Who Moved in the March 1984-1985 Period
(Numbers in thousands)

	Total Population		Movers	
	Number	Percent	Number	Percent
All persons	230,333	100.0%	46,470	100.0
Age				
Under 10 years	30,791	13.4	7,986	17.2
10 to 19 years	35,551	15.4	6,675	14.4
20 to 29 years	41,572	18.0	15,544	33.4
30 to 44 years	51,051	22.2	10,482	22.5
45 to 64 years	44,549	19.3	4,139	8.9
65 years & over	26,818	11.6	1,640	3.5

Migration/Mobility Patterns (continued)

Selected Characteristics of Persons 1 Year & Older Who Moved in the March 1984-1985 Period
(Numbers in thousands)
(continued)

	Total Population		Movers	
	Number	Percent	Number	Percent
Sex:				
Male	111,598	48.5%	23,485	50.5%
Female	118,735	51.5	23,434	50.4
Region of Residence				
Northeast	48,713	21.1	7,034	15.1
Midwest	57,888	25.1	11,061	23.8
South	77,962	33.8	17,011	36.6
West	45,769	19.9	11,365	24.5

Source: U.S. Bureau of the Census, Current Population Reports
Geographical Mobility: 1985 (Series P-20, No. 420)
(December 1987)

Mobility Status of the Population Age One Year & Older By Regions, March 1984-March 1985

	U.S. Total	Northeast	Midwest	South	West
All persons (thousands)	230,333	48,713	57,888	77,962	45,769
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Nonmovers	79.8	85.6	80.9	78.2	75.2
Movers, total	20.2	14.4	19.1	21.8	24.8
Local movement (within county)	13.1	9.5	13.0	13.8	15.7
Nonlocal:	6.5	4.4	5.8	7.4	8.0
Different county, same state	3.5	2.4	3.3	3.9	4.1
Different state	3.0	2.0	2.5	3.5	3.9
From abroad	0.6	0.5	0.3	0.7	1.1

Source: U.S. Bureau of the Census, Current Population Reports:
Geographical Mobility: 1985
(Series P-20, No. 420)

MARITAL STATUS/MARRIAGES

Delayed marriages, the increase in divorces and separations (not to mention the high cost and unavailability of housing) have resulted in a change in living arrangements of young adults. Persons 18 to 34 are much more likely to be living at home with their parents than in the 1960's and 1970's. Most of these changes have occurred in the 1980's.

The proportion of men and women 18 to 24 years old who maintained their own homes as householders or spouses of householders (heads) dropped from 34% to 27% for men and from 53% to 40% for women between 1960 and 1986, according to the Census Bureau. (Current Population Reports, Series P-20 No. 418). Corresponding increases occurred in the proportion of persons 18 to 24 years old who had never left or who had returned to the homes of their parents. (Recent data issued by the Bureau shows a marked slackening in the number of people living alone.)

The proportion of 18 to 24 year old men living with parents rose from 52% to 59% between 1960 and 1986, and for women of this age, from 35% to 47%.

Young adults 25 to 34 have shown similar patterns of change in living arrangements, particularly for men. The proportion who were householders or the spouses of householders declined from 82% in 1960 to 75% in 1986 for men, but changed only slightly for women, 88% and 85%, respectively. While the proportion of men living at home with their parents increased from 11% to 14% between 1960 and 1986, the proportion of women held at 7% in both years. Of course, the great growth in population counts in these age groups, previously noted, is an added dimension to this development.

Marriages

The marriage rate in the U.S. (the number per 1,000 population) has been falling in line with the figures noted above on the trend in the number of young adults -- the predominate group in the population -- who have never married. In the first nine months of 1987, marriages were up slightly (0.8%), but the marriage rate was the same in this period in 1987 and 1986 (10.1).

Provisional statistics issued by the National Center for Health Statistics showed a slight decline in the number of couples married in 1986 (-1.0%). The national marriage rate fell 2% from 10.2 per 1,000 population in 1985 to 10.0 per 1,000 in 1986, the second consecutive drop after a period of fairly steady rates from 1980-1984. The marriage rate, recorded since 1867, has ranged from a high of 16.4 in 1946 to a low of 7.9 in the depression year of 1932. Along with population projections, the number of marriages can be expected to decline as the number of young adults diminishes.

Marriages and Marriage Rates: Selected Years, 1970-1986

	Number	Rate
1986	2,400,000	10.0
1985	2,425,000	10.2
1980	2,390,252	10.6
1977	2,178,367	9.6
1975	2,152,662	10.0
1973	2,284,108	10.8
1970	2,158,802	10.6

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics

Marriages (continued)

The latest available count on marriage orders, covering 1983, showed a decline in the percent of marriages that were the first for both bride and groom -- from almost 69% of all marriages in 1970 to 54.4% in 1983. A remarriage for the bride was involved in 34% of the 1983 marriages vs. 24% in 1970; for the groom, 35% vs. 24%, respectively. This pattern of course affects buying practices relating to the bridal market, as well as wedding arrangements. However, there has been a trend to greater formality in weddings in recent years, particularly for first marriages, and increasingly for re-marriages due to the youthfulness of these brides and grooms.

The marital status of the adult population has undergone great changes over the last few decades, reflecting changes in the age distribution and changes in the degree to which marriage has been postponed, as well as in the number of divorces and separations.

Preliminary figures for 1987 issued by the Census Bureau show 30% of the males age 15 and over and 23% of the females of this age have never married. Comparable percents in 1970 were 28.1% and 22.1%, respectively. The biggest change has been in the age groups now constituting a record number in the U.S. population -- young adults. The percentage of 25-to-29 year olds that have not married has increased sharply since 1970--from 19% to 42% for men, and from 11 to 29% for women.

Never-Married in Selected Age Groups: 1970, 1980, 1987
(Population in thousands)

	1987		1980		1970*	
	Population	% Never Married	Population	% Never Married	Population	% Never Married
Males						
Age 15 & over	89,368	30.0%	81,947	29.6%	70,559	28.1%
Age (years)						
15 to 19	9,192	98.6	10,425	97.3	11,497	97.4
20 to 24	9,449	77.7	10,134	68.8	7,198	54.7
25 to 29	10,694	42.2	9,513	33.1	6,592	19.1
30 to 34	10,448	23.1	8,538	15.9	5,599	9.4
35 to 39	9,163	12.4	6,792	7.8	5,439	7.2
Females,						
Age 15 & over	97,320	23.0	89,914	22.5	77,766	22.1
Age (years)						
15 to 19	8,993	94.6	10,337	91.2	11,432	90.3
20 to 24	9,859	60.8	10,557	50.2	8,409	35.8
25 to 29	10,942	28.8	9,741	20.9	6,841	10.5
30 to 34	10,552	14.6	8,824	9.5	5,829	6.2
35 to 39	9,423	8.4	7,052	6.2	5,708	5.4

* Figures for 1970 include persons 14 years of age.

Source: U.S. Bureau of the Census: Current Population Reports,
Households, Families, Marital Status: March 1987
Advance Report (Series P-20, 417) Issued August 1987

Marriages (continued)

The high proportions of never-married persons in their late twenties and early thirties not only indicates that these people are postponing marriage to a greater extent, but also suggests that a somewhat higher proportion may elect never to marry.

In 1987, the median age at first marriage was 25.8 years for men and 23.6 years for women, according to the Census bureau. The median age at first marriage has been rising for the past 30 years, and this trend accelerated between 1975 and 1987, particularly for women as they became increasingly involved with careers, and financially independent.

Median Age at First Marriage, By Sex: 1970, 1975, 1980, 1987

Year	Men	Women
1987	25.8	23.6
1980	24.7	22.0
1975	23.5	21.1
1970	23.2	20.8

Source: U.S. Bureau of the Census, Current Population Reports, Advance Report (Series P-20, No. 417) issued August 1987

There is a wide variation in the marriage rate regionally and by states. In 1985, the rate by geographic divisions ranged from a high of 17.8 in the Mountain States to a low of 8.2 in New England. Rates in all regions except the Middle Atlantic were lower in 1986 than in 1980.

Among states, 1986 marriage rates ranged from lows of 7.0 in Massachusetts and 7.2 in West Virginia to highs of 15.3 in Hawaii, 16.0 in South Carolina, and 114.0 in Nevada -- a rate which is distorted by the influx of out-of-state residents who favor Nevada for quicky divorces and re-marriages.

Number of Marriages & Marriage Rates, By Geographic Divisions: 1980, 1986

	1986			1980		
	Number	Percent	Rate**	Number	Percent	Rate**
U.S. Total	2,400,000*	100.0%	10.0	2,390,252	100.0%	10.6
Geographic Regions:						
New England	104,415	4.4	8.2	106,328	4.4	8.6
Middle Atlantic	325,821	13.6	8.7	293,985	12.3	8.0
East North Central	359,925	15.0	8.6	395,517	16.5	9.5
West North Central	155,803	6.5	8.9	173,720	7.3	10.1
South Atlantic	442,498	18.5	10.8	413,113	17.3	11.2
East South Central	176,682	7.4	11.6	168,828	7.1	11.5
West South Central	306,507	12.8	11.4	298,244	12.5	12.6
Mountain	231,913	9.7	17.8	241,704	10.1	21.3
Pacific	306,592	12.8	8.6	298,813	12.5	9.4

(footnotes continued)

Marriages (continued)

* Because some states use a different method of compiling estimates on marriages -- including for some counts on licenses issued rather than marriages -- regional totals do not add to the 1986 national total, which is separately calculated by the Health Dept.

**Rate per 1,000 population. Note that marriage counts by State, on which regional totals are based, are by place of occurrence, not necessarily the residence of the couples. In particular, this inflates the Mountain Region's rate and total, as many out-of-State residents, particularly Californians, marry in Nevada.

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics

Marriages are seasonal, with the fewest in January and the most in June, although monthly rates vary from year to year. In 1986, 5.7% of the marriages took place in January and 10.8% in June. Remarriages show less seasonal variation than first marriages.

Monthly Pattern in Marriages & in Marriage Rates: 1985, 1986

	1986		Rate*	
	Number	Percent	1986	1985
Total	2,400,000	100.0%	10.0	10.2
January	135,000	5.7	6.6	6.4
February	147,000	6.2	8.0	8.0
March	150,000	6.3	7.4	7.8
April	185,000	7.7	9.4	8.9
May	228,000	9.5	11.2	11.8
June	259,000	10.8	13.1	14.3
July	237,000	9.9	11.6	11.6
August	243,000	10.2	11.9	12.6
September	231,000	9.7	11.6	12.0
October	211,000	8.8	10.3	10.2
November	174,000	7.3	8.7	9.3
December	200,000	8.4	9.7	9.2

* Monthly rate of marriages per 1,000 women 15-44 years of age.

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics

Divorces

Based on reports for the first nine months of 1987, the divorce rate in the U.S. appears to be holding at the 1986 level, with an indicated small increase in the number of divorces. This follows a decline of 2% in the number reported for the year 1986 compared with 1985 -- 1,159,000 vs. 1,187,000. The 1986 rate per 1,000 population was 4.8 compared with 5.0 in 1985. The divorce rate climbed fairly steadily through the 1960's and 1970's, reaching an all-time high of 5.3 in 1979 and 1981.

HOUSEHOLDS/FAMILIES

Advance information released by the Census Bureau in August 1987 based on the annual Current Population Survey taken in March, indicates an estimated 89.5 million households in the U.S. This represented a gain of one million over the March 1986 count, well below the average annual increase of 1.2 million households averaged thus far in the 1980's and comparing with the average annual increase of 1.6 million in the 1970's. In the 1970-1980 period, the number of households in the U.S. increased by 17.4 million; in the 1980-1987 period, the increase was 8.7 million.

Two major categories of households are identified by the Census Bureau: family and nonfamily. A family or family household consists of at least two persons: the householder (formerly identified as the household head) and one or more additional persons related to the householder by blood, marriage, or adoption. A nonfamily household is composed of a householder who either lives alone or exclusively with persons to whom the householder is not related. Within the family household classification, the Census Bureau distinguishes three major types of family households: married-couple families, families with female householders (no husband present), and families with male householders (no wife present). Within these three broad categories is an array of family situations which differ considerably in characteristics of interest to marketers. For example, there are family households with young couples who have no children, two-parent families, one-parent families, and older couples whose children have left home. Important and continuing changes are occurring in the composition of the Nation's families and households.

The bulk of the nation's households still consists of family households, which numbered 64.5 million in 1987 and account for 72.1% of the U.S. household total -- down from their 73.7% share in 1980, 81.2% in 1970. This drop has been entirely in the share represented by married couple families. In 1987, there were 51.5 million of these households, 4.9% over the 1980 total of 49.1 million. But their share of all households dwindled to 57.6% from 70.5% in 1970, 60.8% in 1980. The gains in family households are concentrated in those maintained by men or women (particularly women) with no spouse present--the single parent phenomena. (Children under 18 were present in about 39% of the families maintained by men without a wife present, compared to 60% of those families that are maintained by women without a husband present.)

HOUSEHOLDS/FAMILIES

The increase in non-family households, particularly singles, has been a major factor in household growth since 1970. For the first time, however, in 1987 growth in non-family households--85% of which are singles--came to a virtual halt. Overall, the number of nonfamily households increased only 0.35% in 1987 compared with 1986, to total less than 25 million. The people living alone, however, decreased 0.24% in number to total 21,128 million. This ties in with the figures previously noted on the growing number of young adults who are living with their parents. People living alone accounted for only one-third of the net increase in households since 1980, a sharp drop from 43% in the 1970s.

The plateau in the number of non-family households may also reflect the shrinking ranks of young adults who are more likely to live alone. The number of people age 18 to 24 years has declined about 10% since 1980. The rising cost of living -- especially housing costs --may also be a factor in the decision of a young wage earner to marry another wage earner, or to remain with parents. The population age 15 to 24 years is the only age group to experience a drop in income since 1980. (The median for this group, after adjusting for inflation, declined 9.5% to $15,300 in 1986 from $16,900 in 1980, according to the Census Bureau.)

Household & Family Units, By Type: 1970, 1980, 1987

	1987		1980		1970	
	Number	Percent	Number	Percent	Number	Percent
Households, total	89,479	100.0%	80,776	100.0%	63,401	100.0%
Family households, total	64,491	72.1	59,550	73.7	51,456	81.2
Married-couple family	51,537	57.6	49,112	60.8	44,728	70.5
Other family:						
Male householder	2,510	2.8	1,733	2.1	1,228	1.9
Female householder	10,445	11.7	8,705	10.8	5,500	8.7
Nonfamily households	24,988	27.9	21,226	26.3	11,945	18.8
Living alone	21,128	23.6	18,296	22.7	10,851	17.1
Male householder	10,652	11.9	8,807	10.9	4,063	6.4
Female householder	14,336	16.0	12,419	15.4	7,882	12.4
Average population Per household:						
All ages	2.66	--	2.76	--	3.14	--
Under 18 years	0.71	--	0.79	--	1.09	--
18 years & over	1.96	--	1.97	--	2.05	--
Per family:						
All ages	3.19	--	3.29	--	3.58	--
Under 18 years	0.96	--	1.05	--	1.34	--
18 years & over	2.22	--	2.23	--	2.25	--

Source: U.S. Bureau of the Census, Current Population Reports, Households, Families, Marital Status: March 1987, Advance Report (Series P-20, No. 417) Issued August 1987 and Household & Family Characteristics (Series P-20 No. 419)

HOUSEHOLDS/FAMILIES

There has been a significant decline since 1980 in householders in the youngest age categories. The number of householders age 20 to 24 in 1987 was 40% below the 1980 total. The oldest members of the 1946-64 Baby Boom are passing age 40, and persons born at the peak of the boom have reached age 30. These persons are being replaced in the younger age groups by the numerically smaller generation that followed. The decline in young adult householders has been accentuated by the larger proportion of young adults that are now postponing the formation of their own households.

The aging of the Baby Boom is also reflected in the increase in the number of householders in the middle age range. Those age 35 to 39 increased by 32% from 1980 to 1987. At the top of the age scale, the number of households maintained by those age 75 years and older rose 21% and accounted for 9% of all households in 1987.

Age of Householder: 1980, 1987
(Number in thousands)

	1987		1980		% Change
	Number	Percent	Number	Percent	1987/1980
Householders, total	89,479	100.0%	80,776	100.0%	+10.8%
15 to 19 years	398	0.4	665	0.8	-40.2
20 to 24 years	4,799	5.4	5,904	7.3	-18.7
25 to 29 years	9,652	10.8	9,252	11.5	+ 4.3
30 to 34 years	10,850	12.1	9,252	11.5	+17.3
35 to 39 years	10,155	11.4	7,684	9.5	+32.2
40 to 44 years	8,549	9.6	6,296	7.8	+35.8
45 to 54 years	13,211	14.8	12,654	15.7	+ 4.4
55 to 64 years	12,868	14.4	12,525	15.5	+ 2.7
65 to 74 years	11,250	12.6	10,112	12.5	+11.3
75 years & over	7,748	8.7	6,432	8.0	+20.5

Source: U.S. Bureau of the Census, Current Population Reports, Households, Families, Marital Status: March 1987 Advance Reports (Series P-20, No. 417) Issued August 1987

Details on household composition reported by the Census Bureau show marked changes since the 1970's beyond those noted above. As a result of lowered birth totals there has been an increase in the number of households with no children under age 18. In 1987, family households without children of their own represented 36.4% of all households, up from a 35.8% share in 1970. There was a net change of 46.7% in these families in the 1980-1987 period compared with 33.4% in the 1970-1980 period. There was a 2.2% increase in the number of family households without own children under 18 in 1987 compared with 1986, bringing the total to 32.6 million.

HOUSEHOLDS/FAMILIES

Within this group, married-couple families without own children under 18 number 26.9 million in March 1987 and represented 30.1% of households. There has been a net change of 31.5% in the size of this group in 1980 to 1987, compared with a net change of 28.5% in the 1970-1980 period. As householders move into middle age, there is a much greater likelihood that the family will have at least one child and the birth totals among older mothers who have a child after postponing childbirth, (a current development) may result in a short term rise in the number of households with children under 18. This will eventually be counter-balanced by the aging of householders.

Household Composition, By Presence of Own Children Under 18:
1970, 1980, 1987
(Numbers in thousands)

	1987		1980		1970	
	Number	Percent	Number	Percent	Number	Percent
All households	89,479	100.0%	80,776	100.0%	63,401	100.0%
Family households	64,491	72.1	59,550	73.7	51,456	81.2
No own children under 18	32,593	36.4	28,528	35.3	22,725	35.8
With own children under 18	31,898	35.6	31,022	38.4	28,731	45.3
Married couple family	51,537	57.6	49,112	60.8	44,728	70.5
No own children under 18	26,892	30.1	24,151	29.9	19,196	30.3
With own children under 18	24,645	27.5	24,961	30.9	25,532	40.3
Other family, male householder	2,510	2.8	1,733	2.1	1,228	1.9
No own children under 18	1,554	1.7	1,117	1.4	887	1.4
With own children under 18	955	1.1	616	0.8	341	0.5
Other family, female householder	10,445	11.7	8,705	10.8	5,500	8.7
No own children under 18	4,147	4.6	3,261	4.0	2,642	4.2
With own children under 18	6,297	7.0	5,445	6.7	2,858	4.5
Nonfamily households	24,988	27.9	21,226	26.3	11,945	18.8
Male householder	10,652	11.9	8,807	10.9	4,063	6.4
Living alone	8,246	9.2	6,966	8.6	3,532	5.6
Female householder	14,336	16.0	12,419	15.4	7,882	12.4
Living alone	12,881	14.4	11,330	14.0	7,319	11.5

Source: U.S. Bureau of the Census, Current Population Reports, Household, Families, Marital Status: March 1987 Advance Report (Series P-20, No. 417)

Detailed findings on household composition based on the 1987 survey will be published by the Census Bureau later in 1988. A major development has been the increase in family householders with no spouse present. These tend to be considerably younger than householders in married-couple families. And they are getting younger due to the increase in unmarried mothers, separations and divorces at a young age.

In 1986, of the close to 51 million married-couple households, 27.2% had householders under 35 years of age, compared with 28.2% of the 44.7 million total in 1970. In family households with a female head (10.2 million in 1986 vs. 5.5 million in 1970) heads under age 35 accounted for 33.1% of the 1986 total, 23.4% in 1970. In family households with a male head (2.4 million in 1986 and 1.2 million in 1970), heads under 35 accounted for 33.5% and 15.6%, respectively.

HOUSEHOLDS & FAMILIES

Household composition within the 88 million total varies considerably based on the age of household head, type of household (family vs. other), and many other factors, which are covered in detail in the Census Bureau reports. The following profiles the overall household composition in terms of selected characteristics.

Selected Characteristics of U.S. Households: March 1986
(Numbers in thousands)

	1986		1985	
	Number	Percent	Number	Percent
All households	88,458	100.0%	86,789	100.0%
Households with members:				
Under 18 years of age	33,975	38.4	33,358	38.4
18 to 64 years of age	74,593	84.3	73,147	84.3
65 years & over	20,596	23.3	20,128	23.2
Number of household members:				
All ages	236,229	--	233,516	--
Under 18 years of age	62,952	--	62,609	--
18 to 64 years of age	146,070	--	144,204	--
65 years & over	27,206	--	26,703	--
Race of household head:				
White, total	76,576	86.8	75,328	86.8
With members under 18	28,146	31.8	27,712	31.9
With members 65 & older	18,395	20.8	18,048	20.8
Black, total	9,797	11.1	9,480	10.9
With members under 18	4,713	5.3	4,584	5.3
With members 65 & older	1,889	2.1	1,802	2.1
Spanish origin, total (includes Blacks, Whites)	5,213	5.9	4,883	5.6
With members under 18	3,019	3.4	2,827	3.3
With members 65 & older	701	0.8	632	0.7
Household size:				
1 person	21,178	23.9	20,602	23.7
2 persons	27,732	31.3	27,389	31.6
3 persons	16,088	18.2	15,465	17.8
4 persons	13,774	15.6	13,631	15.7
5 or more persons	9,686	10.9	9,703	11.2
Marital status of householder:				
Married, spouse present	50,933	57.6	50,350	58.0
Married, spouse absent	4,084	4.6	3,913	4.5
Widowed	11,363	12.9	11,348	13.1
Divorced	10,269	11.6	9,800	11.3
Single (never married)	11,808	13.3	11,377	13.1

Source: U.S. Bureau of the Census, Current Population Reports: Household & Family Characteristics; March 1985, 1986 (Series P-20, No. 411; P-20, No. 419)

Both household and family size have dropped as the number of people under age 18 per unit continues to decline. In 1987 these were 2.66 persons per household compared with an average of 2.76 in 1980 and 3.14 in 1970. Families averaged 3.19 people in 1987 compared with 3.29 in 1980 and 3.58 in 1970.

HOUSEHOLDS/FAMILIES

Details in the Census Bureau reports include information on the number with own children under 18 years of age, with subdivisions within this age bracket, which can be useful to marketers of children's products.

Family Households With Own Children Under 18: March 1986
(Number in thousands)

	Family Households		Total Children	
	Number	Percent	Number	Percent
Total family households	63,558	100.0%	--	--
No own children under 18	31,888	50.2	--	--
With children under 18	31,670	49.8	57,979	100.0%
1 own child under 18	13,325	21.0	13,325	23.0
2 own children under 18	11,902	18.7	23,804	41.1
3 own children under 18	4,606	7.2	13,818	23.8
4 or more children under 18	1,837	2.9	7,032	12.1
With children under 6	14,581	22.9	19,591	33.8
1 own child under 6	9,847	15.5	9,847	17.0
2 own children under 6	4,092	6.4	8,184	14.1
3 or more own children under 6	642	1.0	1,560	2.7
With children under 3	8,677	13.6	9,661	16.6
1 own child under 3	7,620	12.0	7,620	13.1
2 or more children under 3	1,057	1.6	2,041	3.5
Average number of own children under 18:				
Per all family households	0.31			
Per family with children	1.34			

Source: U.S. Bureau of the Census, Current Population Reports: Household & Family Characteristics: March 1986 (Series P-20, No. 419)

Geographic Distribution

The distribution of households among the States is similar to the population distribution, since a relatively small proportion of the population lives outside of households (i.e. group quarters). The Census Bureau issued a detailed report on regional and State populations and households based on the March 1986 survey in September 1987.

Following population patterns previously noted, the preponderance of household growth has been in the South and West each of which registered a gain of about 15% in number of households in 1986 compared with 1980. The overall gain in households for the nation in this period was 10.5%. Of the four regions of the U.S., the South has the greatest share of households in 1986 (34.2%), followed by the Midwest (24.7%), then the Northeast (20.9%), and the West (20.1%).

HOUSEHOLDS/FAMILIES

Geographic Distribution (continued)

Estimated Number of Households By Region & Geographic Division: 1980, 1986
(Numbers in thousands)

	1986		1980		% Change
	Number	Percent	Number	Percent	1986/1980
United States, total	88,797	100.0%	80,390	100.0%	10.5%
Northeast	18,588	20.9	17,471	21.7	6.4
New England	4,729	5.3	4,362	5.4	8.5
Middle Atlantic	13,859	15.6	13,109	16.3	5.8
Midwest	21,944	24.7	20,859	25.9	5.2
East North Central	15,343	17.3	14,654	18.2	4.7
West North Central	6,600	7.4	6,205	7.7	6.4
South	30,418	34.2	26,486	32.9	14.9
South Atlantic	15,290	17.2	13,160	16.4	16.2
East South Central	5,504	6.2	5,051	6.3	9.0
West South Central	9,624	10.8	8,276	10.3	16.3
West	17,847	20.1	15,574	19.4	14.6
Mountain	4,708	5.3	3,986	5.0	18.2
Pacific	13,139	14.8	11,587	14.4	13.4

Source: U.S. Bureau of the Census, Current Population Reports:
State Population & Household Estimates to 1986
(Series P-25, No. 1010)

California ranks as the leading State in terms of number of households, followed by New York, then Texas. California also leads in terms of numerical increase in households in the past five years, but Alaska was the leader in terms of percentage growth.

States Ranked by Largest Number of Households & Increase in Households: 1980-1986
(Numbers in thousands)

Rank		No. of Households 1986		Numerical Increase 1980-86		Percent Increase 1980-86
1	California	9,842	California	1,212	Alaska	36.2
2	New York	6,672	Texas	987	Arizona	26.3
3	Texas	5,916	Florida	891	Nevada	25.1
4	Florida	4,636	New York	331	Florida	23.8
5	Pennsylvania	4,411	Georgia	328	Texas	20.0
6	Illinois	4,237	North Carolina	296	New Mexico	18.4
7	Ohio	3,998	Virginia	259	Georgia	17.5
8	Michigan	3,315	Arizona	252	New Hampshire	17.1
9	New Jersey	2,776	New Jersey	228	Colorado	16.8
10	North Carolina	2,340	Colorado	191	Utah	14.6

Source: U.S. Bureau of the Census, Current Population Reports:
State Population & Household Estimates to 1986
(Series P-25, No. 1010)

HOUSEHOLDS/FAMILIES

Projections

In 1986, the Census Bureau published projections of the number of households and families for the years 1986 to 2000. Three different series were issued, each based on different assumptions regarding future rates of household formation and population change.

According to the highest series, the number of households in the U.S. would reach 110.2 million by July 1, 2000 -- 23.4 million more than the 86.8 million in March 1985. The lowest series anticipates a total of 102.4 million by the year 2000, or an increase of 15.7 million households. These two series show increases of 27% and 18%, respectively, over the 1985-2000 period.

Husband-wife households made up 58% of all households in 1985. In the projections for the year 2000, husband-wife households range from 47% of all households in the highest total projection (Series A) to 59% of the lowest projected total (Series C). (For further details, see: Bureau of the Census, Current Population Reports: Population Estimates & Projections: Projections of the Number of Households & Families 1986-2000 (Series P-25, No. 986).

The most important developing trend is the middle-aging of American households. According to the middle series of projections, householders aged 35 to 54 will account for the bulk of household growth in the next 15 years. Between 1985 and 1990, the nation will gain more households headed by persons age 35 to 44 than age 45 to 54, but after 1990, growth will be dominated by the older group. The number of householders 45 to 54 years of age is expected to increase by an average of 700,000 a year through the 1990's.

Beginning in the 1990's, households headed by 25-34 year olds will decline, and newlyweds will represent a dwindling share of all new households.

LIVING ARRANGEMENTS

Young Adults

Although young adults are still much more likely to live alone today than they were a generation ago, as has been previously noted in this report, the rise in single-member households, particularly among young adults, has been slowing down in the 1980's. The proportion of men and women 18 to 24 years old who maintained their own homes as householders or spouses of householders dropped from 32% in 1960 to 17% in 1986 for men, and from 51.1% to 32.4% for women in the same period. In 1986, 59% of the males in this age group living with a parent or parents, up from 54% in 1980, 52% in 1960. Among females age 18 to 24 years, the proportion living at home climbed from 35% to 47%. A continuance in this trend is likely in view of economic and housing conditions.

LIVING ARRANGEMENTS

Young Adults

Living Arrangements of Young Adults By Sex: Age 18 to 24

	1986	1980	1970	1960
Males age 18 to 24 years				
Number (thousands)	13,324	14,278	10,398	6,842
Percent	100.0%	100.0%	100.0%	100.0%
Child of householder	58.8	54.3	54.3	52.4
Family householder or spouse	17.1	21.3	30.0	31.6
Nonfamily householder	9.5	11.1	5.4	2.7
Other	14.6	13.3	10.3	13.4
Females age 18 to 24 years				
Number (thousands)	13,787	14,844	11,959	7,876
Percent	100.0%	100.0%	100.0%	100.0%
Child of householder	46.7	42.7	41.3	34.9
Family householder or spouse	32.4	36.2	44.7	51.1
Nonfamily householder	7.5	8.1	4.2	2.2
Other	13.4	13.1	9.7	11.8

Source: U.S. Bureau of the Census, Current Population Reports: Marital Status and Living Arrangements: March 1986
(Series P-20, No. 418)

Age 25-64 Years

Living Arrangements of the Population Age 25-64 Years
By Age & Sex: March 1986
(Numbers in thousands)

	Age (Years)				
	25 to 29	30 to 34	35 to 44	45 to 54	55 to 64
Male					
Total number	10,751	10,205	15,955	10,970	10,350
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Householder*	64.5	77.4	84.7	90.3	89.4
Family householder	46.5	62.1	72.8	79.5	79.5
Nonfamily householder	18.0	15.3	11.9	10.8	9.9
Living alone	11.5	11.4	9.7	9.0	9.0
Not a householder	35.5	22.6	15.3	9.7	10.6
In families	26.8	17.1	11.6	7.7	8.4
Not in families	8.8	5.5	3.7	2.0	2.2
Married, wife present	49.4	64.6	74.8	80.2	80.7
Female					
Total number	10,868	10,229	16,552	11,692	11,712
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Householder*	26.2	26.7	27.0	27.3	30.7
Family householder	15.5	18.3	19.9	17.5	12.9
Nonfamily householder	10.7	8.5	7.1	9.8	17.8
Living alone	7.9	7.1	6.0	8.8	17.1
Not a householder	73.8	73.3	73.0	72.7	69.2
In families	66.9	69.4	70.7	71.2	68.1
Not in families	6.9	3.9	2.2	1.5	1.1
Married, husband present	58.8	68.9	71.2	71.7	67.6

*Defined, for practial purposes, as the household head.

Source: U.S. Bureau of the Census, Current Population Reports: Marital Status and Living Arrangements: March 1986
(Series P-20, No. 418)

LIVING ARRANGEMENTS

The Elderly

From 1980 to 1986, the resident non-institutional population of the U.S. age 65 years and older increased 13% compared with the overall gain in all age groups of 6%. The mature market will continue to expand and draw increasing attention as older people continue to gain in buying power. Women outnumber men as they average longer life spans and the pattern in living arrangements reflects this. In 1986, the resident, non-institutional female population age 65 and older numbered 16.0 million compared with 11.3 million men of this age. Of the men, 74% were married and lived with their spouses, 74% were heads of family households, only 15% lived alone. Among women age 65 and older, only 38% were married and living with their husbands, 41% were living alone.

Living Arrangements of the Mature Population, Age 65 & Older
By Age & Sex: March 1986
(Number in thousands)

	Age (Years)					
	65 & Older		65 to 74		75 & Older	
	Number	%	Number	%	Number	%
Male						
Total	11,272	100.0%	7,440	100.0%	3,832	100.0%
Householder*	10,094	89.5	6,773	91.0	3,321	86.7
Family householder	8,333	73.9	5,768	77.5	2,565	66.9
Nonfamily householder	1,761	15.6	1,005	13.5	756	19.7
Living alone	1,681	14.9	945	12.7	736	19.2
Not a householder	1,178	10.4	667	8.9	511	13.3
In families	975	8.6	549	7.4	426	11.1
Not in families	203	1.6	118	1.6	85	2.2
Married, living with wife	8,393	74.4	5,891	79.2	2,502	65.3
Female						
Total	16,049	100.0%	9,439	100.0%	6,610	100.0%
Householder*	8,502	53.0	4,383	46.4	4,119	62.3
Family householder	1,734	10.8	1,036	11.0	698	10.6
Nonfamily householder	6,768	42.2	3,347	35.5	3,421	51.7
Living alone	6,636	41.3	3,265	34.6	3,371	51.0
Not a householder	7,548	47.0	5,056	53.6	2,492	37.7
In families	7,347	45.8	4,963	52.6	2,384	36.1
Not in families	201	1.2	93	1.0	108	1.6
Married, living with husband	6,153	38.3	4,643	49.2	1,510	22.8

* Defined, for practical purposes, as the household head.

Source: U.S. Bureau of the Census: Current Population Reports,
Marital Status and Living Arrangements: March 1986
(Series P-20, No. 418)

LIVING ARRANGEMENTS

Children

Of the 61.1 million children under 18 years of age who lived with one or both parents in 1986, 14.8 million (24%) lived with only one parent. Even though the total number of children under 18 has declined from 64 million in 1960, the number affected by divorce, separation, and out-of-wedlock births has escalated. In 1960, only 9% of those living with a parent were in one-parent families. Of the 14.8 million living with one parent in 1986, 89% lived with their mothers, 11% with their fathers.

Living arrangements of children vary by race and Hispanic origin. In 1986, 80% of the 50.9 million White children lived with two parents and 18% lived with one parent. The lone parent was usually divorced. Of the 9.4 million Black children, 41% lived with two parents while slightly more than half lived with one parent -- usually a never-married parent. For Hispanic children (regardless of race), 67% lived with both parents, 30% lived with only one parent.

Living Arrangements of Children Under 18 Years: March 1986
By Age & Race
(Number in thousands)

	Total	Both Parents	Mother Only	Father Only
Children under 6 years				
White	17,474	14,656	2,462	356
Black	3,103	1,230	1,774	99
Hispanic*	2,289	1,638	594	56
Children 6 to 11 years				
White	15,978	12,942	2,687	350
Black	2,908	1,280	1,561	67
Hispanic*	2,106	1,407	643	56
Children 12 to 17 years				
White	16,533	13,084	2,872	577
Black	2,916	1,359	1,492	66
Hispanic*	1,835	1,230	546	59

* Persons of Hispanic origin may be of any race. Columns by race are, therefore not additive.

Source: U.S. Bureau of the Census: Current Population Reports, Marital Status and Living Arrangements: March 1986 (Series P-20, No. 418)

White children are more likely to live with parents who have higher incomes and who own their own homes than are Black children and children of Hispanic origin. In general, children in one-parent situations are clearly disadvantaged compared with their two-parent counterparts.

LIVING ARRANGEMENTS

Children (continued)

Children Under 18 Years Living With One or Two Parents, By Race of Child & Selected Characteristics of Parents

	White		Black		Hispanic	
	2 Parents	1 Parent	2 Parents	1 Parent	2 Parents	1 Parent
Total children (thous.)	40,681	9,303	3,869	5,058	4,275	1,955
Percent	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Age of parent						
Under 25 years	3.9	12.0	4.2	19.1	6.4	12.5
25 to 34 years	36.3	40.7	39.1	48.7	40.6	46.9
35 to 44 years	44.1	37.5	40.0	24.8	36.4	33.3
45 years & over	15.7	9.7	16.7	7.4	16.6	7.3
Employment status of parent						
Employed	87.5	62.8	78.1	42.6	79.8	40.5
Unemployed or not in the labor force	12.5	37.2	21.9	57.4	20.2	59.5
Family income:						
Less than $10,000	7.0	47.9	9.9	69.3	17.4	69.9
$10,000 to $19,999	16.4	26.9	27.8	20.6	29.5	19.5
$20,000 to $29,9999	21.7	15.4	24.5	6.5	26.4	6.9
$30,000 to $39,999	21.1	5.5	17.3	2.7	12.5	1.6
$40,000 or more	33.9	4.3	20.6	0.8	14.2	2.0

Source: U.S. Bureau of the Census; Current Population Reports, Marital Status and Living Arrangements: March 1986 (Series P-20 No. 418)

FERTILITY/BIRTHS

Two different sets of government data cover the subject of fertility and births in the U.S. which differ somewhat. The National Center For Health Statistics issues monthly and annual reports on the birth rate (live births per 1,000 population), the fertility rate (live births per 1,000 women aged 15 to 44 years) and an estimated number of live births within the U.S.

The Census Bureau issues annual reports on the components of population change, including births and details on women who gave birth in a 12-month period. The Bureau's fertility rate covers births per 1,000 women age 18 to 44 years. The number of births -- unlike the National Center's birth totals, includes babies born among the U.S. Armed Forces overseas as well as U.S. births.

In the 11-month period ending November 1987, the National Center for Health Statistics reported a total of 3,517,000 births in the U.S., which was 2.4% above the comparable 1986 total. The birth rate in the 1987 period was 15.8 vs. 15.6 in 1986; the fertility rate was 66.4, 2% above the rate for the first 11 months of 1986 (65.4).

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FERTILITY/BIRTHS

The slight gains registered do not portend a significant reversal in birth trends. They reflect to an important degree the surge in births among older women who had delayed having a child combined with the increase in the number of women at the top end of the age scale. But U.S. Bureau of Census projections indicate that the number of women in the childbearing ages, in total, is not expected to change for the remainder of this decade, and the number in the age groups accounting for most births will continue to decline, as those born in the low birth years of the early to middle 1970's reach the childbearing ages. During the next several years, therefore, if the number of births is to increase, there would have to be increases in the birth rates for at least some age groups. In recent years, increases in these rates have occurred primarily among women in their thirties and declines have been measured for women aged 15-29 years, the ages during which more than three-quarters of childbearing typically occurs in the U.S.

U.S. births in 1986, reported at 3,731,000 by the National Center for Health Statistics, were slightly below the 1985 total, and both the birth rate per 1000 population and the fertility rate per 1,000 women 15-44 years of age decreased between 1985 and 1986. The fertility rate, of 64.9 compared with 66.1 in 1985, and was the lowest ever record in the U.S.

The Census Bureau in its middle series of population projections estimated that total births would drop to about 3.5 million by the year 2000. A slight increase (0.5%) was anticipated in the birth total among women age 15 to 19 in the year 2000 compared with 1987, but declines were projected for other significant age groups: age 20-24 (-13.5%), age 25-29 (-20.4%), age 30-34 (-3.6%).

The annual birth total in the U.S. took an upward turn following a 15-year decline from 1960-1975, and is leveling off at about 3.7 million. This is far below the total of 4.3 million babies arriving in 1957--the peak year of the baby boom.

Trends in Estimated Births & Fertitily Rates: Selected Years 1970-1987

Calendar Year	Births* (thousands)	General Fertility Rate**
1987	3,772	na
1986	3,687	64.9
1985	3,750	66.1
1980	3,612	68.4
1975	3,144	66.0
1970	3,739	87.9

na not available

* Includes births among U.S. Armed Forces overseas.

** Fertility rates are based on births per 1,000 women age 15-44 years in the resident U.S. population as of mid-year.

Source: U.S. Bureau of the Census: Current Population Reports, Estimates of U.S. Population and Components of Change (Series P-25 No. 1006, 1016)

FERTILITY/BIRTHS

The Census Bureau's most recent annual analysis of women who gave birth, covering the 12-month period ending June 1986, confirmed the trend to older mothers of new born babies. In this period, 32.4% were over 30 years of age compared with 24% in 1980. Half of the new mothers were in the labor force compared with 38% in 1980. In the period ending June 1986, 22.4% of the new mothers held managerial or professional positions, 42.9% were in technical, sales or administrative support employment, 19.3% were in service occupations; the remainder in factory work and miscellaneous categories.

Women Who Gave Birth in Selected Years
Ending June -- 1976-1985

	1986	1985	1984	1980	1976
Total number of women who gave birth in 12 months ending June (thousands)	3,625	3,497	3,311	3,247	2,797
Age distribution:					
Total, 18-44 years	100.0%	100.0%	100.0%	100.0%	100.0%
18-24	33.3	38.3	37.8	43.0	46.2
25-29	34.3	33.5	33.9	33.3	33.2
30-34	22.5	20.1	21.2	16.0	14.4
35-39	7.9	6.6	5.9	5.9	4.9
40-44	2.0	1.5	1.2	1.8	1.3
Percent in the labor force:	49.8	48.4	46.7	38.0	31.0

Source: U.S. Bureau of the Census: Current Population Reports, Fertility of American Women: (Annual Reports)

Of the 3,625,000 women age 18 to 44 years who gave birth in the 12 month period ending June 1986, 2,951 were White (81.4%), 520,000 were Black (14.3%), and 429,000 were of Spanish origin (11.8%). The latter may be of any race, and there is some duplication, therefore, in these figures.

Of the White mothers, 88.2% were currently married. Among Black mothers, those currently married accounted for 50.8%; among mothers of Spanish origin, 77.2%. For all women 18 to 44, 42% reported that it was their first birth, resulting in a first birth rate of 27.7 per 1,000 women.

Close to 29% of the White mothers were in families with incomes of $30,000 or more in the 1986 period. Among Blacks, this percentage was only 11.2%; among Hispanics, 12.3%.

FERTILITY/BIRTHS

Distribution of Women Giving Birth in Year Ending June 1986 By Income Group/By Race

(Covers women age 18 to 44 years)

	Total	White	Black	Hispanic*
Total new mothers age 18 to 44 years (in thousands)	3,625	2,951	520	429
Family income				
Total mothers-percent	100.0%	100.0%	100.0%	100.0%
Under $15,000	33.4	28.5	60.4	57.1
$15,000 - $19,999	10.5	10.4	10.6	9.3
$20,000 - $24,999	11.1	11.8	7.7	8.8
$25,000 - $29,999	9.7	10.5	6.3	6.8
$30,000 - $34,999	8.8	10.0	3.8	5.8
$35,000 & over	24.0	26.2	8.8	11.6
Income not reported	2.5	2.6	2.4	0.7

* Hispanics may be of any race.

Source: U.S. Bureau of the Census: Current Population Reports: Fertility of American Women: June 1986 (Series P-20 No. 421)

Of the 51,581,000 women in the U.S. population covered in the Census Bureau report for the 12 months ending June 1986, 37.3% had no children, 19% had one, 24.9% had two; 11.9% had three, and 6.8% had four or more. The report gives an indication of the number of children by age of mother (although it includes counts for nonsurviving children as well as live).

Children Ever Born to Women By Age Group: 18-34 Years As of June 1986

(Number of children in thousands)

Current Age of Mother	Number of Children	Percent
18 to 34 years, total	34,918	100.0%
18 to 19 years	562	1.6
20 to 24 years	5,264	15.1
25 to 29 years	12,074	34.6
30 to 34 years	17,018	48.7

Source: U.S. Bureau of the Census: Current Population Reports: Fertility of American Women: June 1986 (Series P-20, No. 421)

Birth Order

The high percentage of births that are first babies -- over 41% currently -- is good news for marketers of baby products, along with the fact that mothers are increasingly older and more affluent (although it must not be forgotten that some 20% of babies are born into households at the poverty level). The more-favored first-borns generally benefit from a greater outlay for the nursery than needed for a second child or latter arrival. It has been estimated that parents spend only 69% as much on a second child as they do on their first. Doting grandparents are also available to a greater extent than ever, due to longevity and greater affluence, to shower babies with gifts, representing an important segment of the baby business.

FERTILITY/BIRTHS

Birth Order

Live-Birth Order -- Percent of Total Births in Selected Years, 1972-1985

	1985	1984	1979	1972
Total live births	100.0%	100.0%	100.0%	100.0%
Birth order:				
First	41.4	41.7	42.3	39.6
Second	33.1	33.0	32.0	28.5
Third	15.6	15.3	15.1	14.1
Fourth & higher	9.5	9.5	10.7	15.0
Not stated	0.6	0.5	--	2.8

Source: U.S. Dept. of Health & Human Services, National Center for Health Statistics: Advance Report of Final Natality Statistics, 1985 (July 17, 1987)

Sex Ratio In Births

The sex ratio at birth in 1985 was 1,052 males per 1,000 females, slightly above the ratio of 1,050 observed in 1984. Since 1967, there has been little annual variation in the sex ratio, with a range of 1,050 to 1,055 in this period.

Since the mid-1960's, the sex ratio for Whites has ranged from 1,053 to 1,059 males; among Blacks, it has ranged from 1,024 to 1,033 males per 1,000 females since 1970.

Birth Patterns By Month

Percent Distribution of Registered Live Births
By Months, 1982, 1984, 1986

	1986	1984(r)	1982
Birth total	100.0%	100.0%	100.0%
January	8.1	8.0	8.1
February	7.5	7.7	7.5
March	8.3	8.3	8.3
April	8.1	7.8	7.9
May	8.5	8.2	8.3
June	8.2	8.1	8.4
July	8.9	8.9	8.9
August	9.0	9.1	8.9
September	8.8	8.9	8.9
October	8.6	8.7	8.5
November	8.1	8.1	8.0
December	8.3	8.2	8.2

(r) revised

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics (Annual Summaries)

FERTILITY/BIRTHS

Age of Father

For the first time since 1982, the birth rate for men increased 1% in 1985, to 55.7 live births per 1,000 men aged 15-54 years in 1985, the latest figures issued by the National Center for Health Statistics. For White men the rate was 51.9; for Black men, 77.6. Birthrates were up for men in all age groups from 15-19 through 50-54 years.

Regional Variations in Birth Totals

Marketers of baby products, services, and maternity wear, as well as young children's products, should focus on the South and Midwest, which accounted for 34.4% and 25.0%, respectively, of total births in the seven year period 1980-1986. Within the Midwest Region, the East North Central States (Ohio, Indiana, Illinois, Michigan and Wisconsin) accounted for the largest segment (17.4%) of total births reported for any geographic division, followed by the Pacific division (Washington, Oregon, California, Alaska, and Hawaii), with 15.8%.

Number of Births By Regions & Divisions: 1980-1986
(In thousands)

	Number	Percent
Total births, 1980-1986	22,922	100.0%
Northeast	4,232	18.5
New England	1,060	4.6
Middle Atlantic	3,172	13.8
Midwest	5,735	25.0
East North Central	3,994	17.4
West North Central	1,741	7.6
South	7,888	34.4
South Atlantic	3,554	15.5
East South Central	1,419	6.2
West South Central	2,916	12.7
West	5,066	22.1
Mountain	1,451	6.3
Pacific	3,615	15.8

Source: U.S. Bureau of the Census: State Population Estimates, By Age & Components of Change: 1980-1986 (Series P-25, No. 1010)

Data from the National Center of Health Statistics shows a wide variation in fertility rates per 1,000 women age 15-44 by state and region. In 1985, the highest rate was 98.0 (for Alaska and Utah); the lowest, 54.0 (for West Virginia).

Regional Variations in Birth Totals (continued)

Live Births By Race of Child, Birth Rates & Fertility Rates, 1985
U.S. & Nine Geographic Regions

	Number (thousands)			Birth	Fertility
	Total*	White	Black	Rate**	Rate**
U.S. total	3,760.6	2,991.4	608.2	15.8	66.2
New England	179.2	162.9	12.6	14.2	58.3
Middle Atlantic	525.6	410.8	100.4	14.1	60.1
East North Central	633.9	525.0	98.6	15.2	64.2
West North Central	274.7	245.5	19.9	15.6	68.2
South Atlantic	599.1	418.0	169,6	14.9	62.8
East South Central	222.8	160.8	60.2	14.7	62.3
West South Central	478.0	376.9	86.6	18.0	75.3
Mountain	235.4	208.8	8.2	18.4	76.7
Pacific	611.8	482.7	52.1	17.5	72.0

* Includes races other than White and Black.
**Birth rates per 1,000 estimated total population in each area; fertility rates per 1,000 women aged 15-44 years in each area.

Source: National Center For Health Statistics: Advance Report of Final Natality Statistics, 1985 (July 1987)

CHILD CARE ARRANGEMENTS/SCHOOL ENROLLMENT

The early 1980's marked a period of declining populations of school age across the nation as the result of the drop in births after 1964. However, with an upturn in births, there is now an increase in the number of young children. A large percentage of these have working mothers, and youngsters who in the past were counted as pre-schoolers are now in nursery schools and kindergarten, changing the profile of school enrollment. This has generated a new market for children's wear, for school supplies and other pertinent products which develop in line with birth trends and female employment trends.

In a study covering the population of children under 18 as of July 1986 compared with the 1980 census, released by the Census Bureau in December 1987, the number under 5 years of age increased more than 10% in the 1980's, with the fastest growth registered in Sun Belt States and Alaska. Alaska's population of children under 5 grew by over one-half. In Florida, which is most frequently associated with the mature market, the number of preschool age children increased by more than a third in six years. Increases of at least 25% were reported for Arizona, California, Texas and Nevada.

Not all areas have registered gains. The exodus of workers from areas which have encountered depressed economic conditions in recent years is reflected in a drop in the number of youngsters in affected states. Hardest hit, thus far, is West Virginia, which had one-sixth fewer young children than in 1980. Iowa, Kentucky, Indiana and Idaho each lost more than 5% of their preschool population.

CHILD CARE ARRANGEMENTS/SCHOOL ENROLLMENT

A study on "Who's Minding the Kids" issued by the Census Bureau in May 1987, which focused on child care arrangements in the Winter of 1984-1985, reported a total of 8.2 million preschool age children (0 to 4 years old) had working mothers. Of these children, 24% were attending day care centers, nursery school or kindergarten.

Preprimary School

The latest counts on school enrollment, detailed by age, race and school level, currently available are in an advance report for October 1985, issued by the Census Bureau in September 1986. (The final report will be issued in Spring 1988). Based on current projections covering the population, the number of children in nursery school is currently estimated at some 2.9 million, and in kindergarten, about 7.1 million.

Girls have outnumbered boys in nursery school, for some reason, despite the fact that at that age level boys outnumber girls in the overall population.

Enrollment in Nursery School & Kindergarten: 1980, 1985
(Numbers in thousands)

	1985	1980	% Change 1985/1980
Number Enrolled			
Preprimary school, total	6,306	5,163	+ 22.1%
Nursery school, total	2,491	1,987	+ 25.4
Public	854	633	+ 34.9
Private	1,637	1,354	+ 20.9
Kindergarten, total	3,815	3,176	+ 20.1
Public	3,221	2,690	+ 19.7
Private	594	486	+ 22.2
Percentage of Children Enrolled in School			1970
Age 3 and 4 years	38.9%	36.7%	20.5%
Age 5 and 6 years	96.1	95.7	89.5

Source: U.S. Bureau of the Census, Current Population Reports: School Enrollment-Social and Economic Characteristics of Students (Advance Report) (Series P-20, No. 409) (Sept. 1986)

Elementary School & High School

The Census Bureau's child-care report showed a total of 18.3 million children 5 to 14 years of age had working mothers. Of these, 75% were in school, 2.8% in other organized child-care facilities, including nursery school/kindergarten.

Elementary School & High School (continued)

As previously noted in the data on population projections, the number of school age children is now picking up. This is reflected in enrollments in the early grades, though this is not uniformly true throughout the country. While the school population has surged in California and some other states, particularly in the Southwest, in Florida and Georgia, the Census Bureau found that most states had fewer children in school in 1986 than in 1980. The decline in the number of children 5 to 17 years of age was greatest in the Northeast.

The new wave of young children will impact states and regions on an uneven basis, along with varying birth totals and mobility patterns. Current estimates place the number of children age 6 to 13 years at 27.2 million, compared with 26.6 million in 1985.

Enrollment in elementary school peaked in 1970, at 33.9 million, then went into a steady decline until 1984. The latest Census Bureau report on school enrollment showed elementary school enrollment at 26.9 million in 1985, just 28,000 ahead of the 1984 total, but below the 1980 level.

It will be some years before significant increases are noted in the number of high school students. Estimates for 1988 place the population in the 14-to-17 age group at about 13.7 million (about 7.0 million boys, 6.7 million girls). This is 8.1% below the 14.9 million of this age counted in 1985.

Enrollment in Elementary School & High School: 1980, 1985
(Numbers in thousands)

	1985	1980	% Change 1985/1980
Elementary school, total	26,866	27,449	- 2.1%
Public	23,803	24,398	- 2.4
Private	3,063	3,051	+ 0.4
High school, total	13,979	14,556	- 4.0
Public	12,764	13,249*	- 3.7
Private	1,215	1,100*	+ 10.4

* Year 1981 (1980 not available).

Source: U.S. Bureau of the Census, Current Population Reports: School Enrollment-Social and Economic Characteristics of Students (Advance Report) (Series P-20, No. 409) Sept. 1986

College Enrollment

College enrollments have been holding up better than anticipated in view of the declining number of 18-year-olds, although the gain has been among part time, rather than full time students. A Department of Education study in 1986 showed that fewer than half the college students get a degree in the four years after graduating from high school.

College Enrollment: 1985-1990
(Number in thousands)

Year	Full Time	Part Time
1985	7,075	5,172
1986	7,148	5,249
1987	7,000	5,300
1988 (e)	6,970	5,340
1989 (e)	6,980	5,380
1990 (e)	6,900	5,400

(e) estimated

Source: Department of Education (The New York Times, 12/9/87)

The latest profile of college students age 14 to 34 years has been compiled by the Census Bureau as of 1985 compared with earlier years. The Census Bureau's total as of October 1985 was 10,863 thousand students.

Characteristics of College Students 14 to 34 Years Old
October 1965, 1975, 1985

	1985	1975	1965
Number of students, 14 to 34 years (thousands)	10,863	9,697	5,675
Percent	100.0%	100.0%	100.0%
White	85.9	87.8	93.7
Black	9.7	9.8	4.8
Hispanic*	5.3	4.3	na
Men	49.2	55.1	61.7
Women	50.8	44.9	38.3
Age: 14 to 24 years	71.8	74.5	83.6
25 to 34 years **	28.2	25.5	16.4
Full time	71.0	73.3	77.8
Part time	29.0	26.7	22.2
Undergraduate	83.9	83.7	84.9
Graduate	16.1	16.4	15.1

*Hispanics are of either race

**Including students age 14 to over 34, the Bureau reported a 1985 total of 12,524 thousand (13.3% were age 35 years and over; men represented 47.2%, women 52.8%).

Source: U.S. Bureau of the Census, Current Population Reports: School Enrollment - Social and Economic Characteristics of Students: October 1985 (Advance Report) (Series P-20, No. 409)

College Enrollment (continued)

College enrollment figures have been sustained not only by the strong promotional programs of the colleges but by the competition for good jobs, and awareness on the part of students that college degrees lead to better jobs and bigger earnings. Over 75% of freshmen feel that getting a better job is an important reason for going to college, according to a recent study by the American Council on Education. The most rapidly growing groups of college students are those who have already tested the work place -- those age 25 and older, and women.

Expectations of higher earnings are generally borne out by the facts. People with college degrees had an average monthly income of $1,910 in 1984, nearly twice the $1,045 average for those with only high school diplomas, according to a Census Bureau report released in October 1987. The average monthly income for those without a high school diploma was $693.

EDUCATIONAL ATTAINMENT

In November 1987, the Census Bureau issued a detailed report on educational attainment in the U.S., March 1982 to 1985. There has been a remarkable increase in the proportion of the U.S. population who completed at least 4 years of high school. This has increased from one-quarter of the population age 25 and older in 1940 to nearly three quarters in 1985. In 1985, about 36% of adults age 25 and over had completed at least 1 year of college, 19% had completed 4 or more years. In 1940, about 5% had completed 4 or more years of college.

The experience of young adults, 25 to 29 years old, shows the recent changes that have taken place. The proportion of young adults who were high school graduates rose from 38% to 86% between 1940 and 1985. The proportion of young adults who were college graduates rose from 6% in 1940 to 22% in 1985. While changes in enrollment trends in recent years have reduced the difference in the proportions of young men and young women who are college graduates (23% of the men age 25 to 29 vs. 21% of the women in 1985), a substantial difference remained among all adults 25 years old and over -- 23% of the men and 16% of the women were college graduates in 1985.

Based on the Survey of Income and Program Participation, the Census Bureau reported in an October 1987 release that 21% of the adults population age 18 years and over has earned a degree beyond high school. Post-secondary degrees were held by 23% of men, 19% of women, 22% of Whites and 11% of Blacks. While 14% of all degrees held by men were in engineering, just 1.5% of women held degrees in this field. Business accounted for 23% of men's degrees and 15% of women's; 25% of women's degrees were in education, compared with 9% of men's.

EDUCATIONAL ATTAINMENT

High School & College Graduates By Region: March 1985
Age 25 Years & Over
(Numbers in thousands)

		Percent completed	
	Population	High School 4 or More Years	College 4 of More Years
Age 25 Years & over			
U.S.	143,524	73.9%	19.4%
Northeast	31,184	74.0	20.8
Midwest	35,548	75.5	17.5
South	48,649	69.0	17.5
West	28,144	80.2	23.5
Age 25 to 29 Years			
U.S.	21,106	86.1	22.2
Northeast	4,097	88.9	26.9
Midwest	5,250	87.9	21.4
South	7,192	82.7	20.1
West	4,566	87.1	22.1

Source: U.S. Bureau of the Census, Current Population Reports:
Educational Attainment in the U.S., March 1982-1985
(Series P-20, No. 415) (November 1987)

Highest Degree Earned Among Adult Population Age 18 & Over: Spring 1984
(Number in thousands)

		By Age			Sex	
	Total	Under 35	35-54	55 & Over	Male	Female
Total	170,232	68,968	52,744	48,518	80,834	89,398
Doctorate	768	152	378	239	585	183
Professional	1,744	509	787	449	1,432	312
Master's	5,795	1,648	2,940	1,207	3,110	2,685
Bachelor's	18,069	8,321	6,427	3,320	9,581	8,488
Associate	5,768	3,077	2,028	663	2,804	2,964
Vocational	3,105	1,195	1,133	776	1,023	2,082
Some college, no degree	30,301	16,929	8,260	5,111	15,444	14,857
High school graduate only	60,358	26,021	19,842	14,495	26,407	33,951
Not a high school graduate	44,324	11,116	10,950	22,258	20,448	23,826

Source: U.S. Bureau of the Census, Current Population Reports:
Household Economic Studies, Educational Background and
Economic Status: Spring 1984 (P-70, No 11)

LABOR FORCE, EMPLOYMENT, EARNINGS

At the end of 1987, 122.5 million people age 16 years and over were in the nation's labor force (including resident Armed Forces), representing 66.1% of the noninstitutional population. Of this total, 115.5 million were employed (94.3%), the unemployed accounted for 5.7%. At the end of 1986, the size of the labor force was reported at 120.3 million -- 65.7 of the noninstitutional population 16 and over; 112.4 million were employed (93.4%) and the unemployment level stood at 6.6%.

LABOR FORCE, EMPLOYMENT, EARNINGS

The Labor Force

The Bureau of Labor Statistics has prepared projections of the U.S. economy to the year 2000 (See Monthly Labor Review, September 1987). Three alternative projections were developed, based on a range of assumptions which result in high, moderate, and low rates of growth, replacing projections published in 1985.

Two major factors determine labor force growth: changes in population (both total size and distribution by age) and in labor force participation rates. According to moderate growth projections, the labor force is expected to expand by nearly 21 million, or 18%, over the 1986-2000 period. This compares with an increase of almost 31 million, or 35%, in the 1972-1986 period. The rapid growth in the earlier period was due to the baby-boom generation (born between 1946 and 1964) entering the labor force, accompanied by the rapid increases in women's labor force participation rates. The recent slowdown and that projected for the remainder of the century reflect the entry of the smaller numbers from the "birth dearth" generation (those born over the 1965-1978 period) along with the slower rate of projected growth in the participation rates of women.

In the 1986-2000 period, the Labor Department's moderate growth projections anticipate a labor force that is increasingly minority and female. The White labor force is projected to increase less than 15% while the Black labor force is expected to grow by nearly 29%, or by 3.7 million workers. The Hispanic labor force is projected to grow by about 6 million, or more than 74%. Asian and other races are projected to grow by nearly 2.4 million.

The moderate growth projections look for participation of women age 16 and over in the labor force to reach 61.5% by year 2000. This compares with a rate of 55.3% in 1986, 50.9% in 1979, 43.9% in 1972. The growth in the rate will be among women under age 55; participation rates for older women will decline. Women are expected to make up more than 47% of the labor force by 2000, up from 39% in 1972 and 45% in 1986.

Lowered birth totals are currently causing shortages of young people to fill entry level jobs, and this trend will continue at least through the mid-1990's. By the year 2000, the share of the labor force age 16 to 34 and over age 55 is projected to decline and the share of 35-54 year olds is expected to increase.

The number of 25-to-34 year olds is projected to increase through the early 1990's, then show a sharp decline. The number age of 55 to 64 is projected to decline through the mid-1990's, then increase rapidly.

The Labor Force (continued)

Civilian Labor Force & Participation Rates: Actual 1979, 1986 & Moderate Growth Projections 2000

	Participation rate			Level in (thousands)			% Change	
	Actual		Projected	Actual		Projected	1972/	1986/
	1979	1986	2000	1979	1986	2000	1986	2000
Total 16 and over	63.7	65.3	67.8	104,960	117,837	138,775	35.4%	17.8%
Men, 16 and over	77.8	76.3	74.7	60,727	65,423	73,136	22.2	11.8
16 to 19	61.5	56.4	60.2	5,111	4,102	4,501	- 8.4	9.7
20 to 24	86.4	85.8	87.5	8,534	8,149	7,005	20.5	-14.0
25 to 34	95.3	94.6	93.6	16,386	19,383	16,559	57.0	-14.6
35 to 44	95.7	94.8	93.9	11,532	15,029	20,133	44.9	34.0
45 to 54	91.4	91.0	90.1	10,008	9,994	16,332	- 4.0	63.4
55 to 64	72.8	67.3	63.2	7,213	6,954	7,238	- 2.8	4.1
65 and over	19.9	16.0	9.9	1,943	1,812	1,368	-10.5	-24.5
Women, 16 and over	50.9	55.3	61.5	44,233	52,414	65,639	56.5	25.2
16 to 19	54.2	52.9	59.2	4,527	3,824	4,379	6.9	14.5
20 to 24	69.0	72.4	78.4	7,233	7,293	6,746	35.9	- 7.5
25 to 34	63.9	71.6	82.3	11,550	15,209	15,098	130.1	- .7
35 to 44	63.6	73.1	84.2	8,153	12,204	18,438	102.5	51.1
45 to 54	58.4	65.9	75.4	6,891	7,746	14,220	18.2	83.6
55 to 64	41.7	42.3	45.8	4,718	4,940	5,732	16.0	16.0
65 and over	8.3	7.4	5.4	1,161	1,198	1,026	10.0	-14.4
Whites, 16 and over	63.9	65.5	68.2	91,922	101,801	116,701	31.7	14.6
Men	78.6	76.9	75.3	53,857	57,216	62,252	18.9	8.8
Women	50.5	55.0	61.5	38,065	44,585	54,449	52.9	22.1
Blacks, 16 and over	61.4	63.5	66.0	10,665	12,684	16,334	45.0	28.8
Men	71.6	71.2	70.7	5,566	6,373	7,926	31.3	24.4
Women	53.2	57.2	62.1	5,109	6,311	8,408	62.1	33.2
Asian and other[1]								
16 and over	65.9	64.9	65.8	2,373	3,352	5,740	na	71.2
Men	76.7	74.9	72.4	1,314	1,834	2,958	na	61.3
Women	56.0	55.9	60.1	1,059	1,518	2,782	na	83.3
Hispanics[2]								
16 and over	63.5	65.4	68.7	5,215	8,076	14,086	na	74.4
Men	81.2	81.0	80.4	3,182	4,948	8,303	na	67.8
Women	47.4	50.1	56.9	2,033	3,128	5,783	na	84.9

[1] The "Asian and other" group includes American Indians, Natives, Asians and Pacific Islanders. The historic data are derived by subtracting "Black" from the "Black and other" group; projections are made directly.

[2] Persons of Hispanic origin may be of any race. Labor force data for Hispanics are not available before 1976.

na not available

Source: U.S. Labor Statistics: Monthly Labor Review
(September 1987)

The Labor Force (continued)

The Bureau of Labor Statistics' projections on the labor force by the year 2000 anticipate a net increase of 21 million jobs compared with 1986, based on the moderate series of assumptions, with virtually all of this increase in the service-producing sectors. Of the 133 million total jobs, 119 million are expected to be nonfarm wage and salary (or payroll) employment, with 4 out of 5 in service-producing industries (compared with 3 out of 4 in 1986).

Of course, the workforce and the U.S. economy are changing rapidly in ways that could affect projections. Exports, for example, are currently registering strong growth. A recent analysis by The Conference Board, indicated that the U.S. gains more new jobs from a given level of exports than it loses because of the same amount of imports. The Board's analysis suggested that $10 billion worth of exports generates about 193,000 new American jobs, while $10 billion worth of imports eliminates about $179,000 jobs. A Small Business Administration recent report showed that unlike manufacturing as a whole, small manufacturers -- those with 500 jobs or fewer -- have been adding workers --accounting for 1.2 million jobs in the period from 1976 to 1984. A continuance of this trend would help stem the fall in manufacturing employment.

Employment By Major Sector: 1979, 1986 & Moderate Growth Projections to 2000

	Employment (thous.)			Average Annual Rate of Change	
	1979	1986	Projected 2000	1979-1986	1986-2000
Total	101,353	111,623	133,030	1.4%	1.3%
Nonfarm wage and salary[1]	89,481	99,044	119,156	1.5	1.3
Goods-producing	26,463	24,681	24,678	-1.0	.0
Mining	958	783	724	-2.8	- .6
Construction	4,463	4,904	5,794	1.4	1.2
Manufacturing	21,042	18,994	18,160	-1.4	- .3
Durable	12,762	11,244	10,731	-1.8	- .3
Nondurable	8,280	7,750	7,429	- .9	- .3
Service-producing[1]	63,018	74,363	94,478	2.4	1.7
Transportation and public utilities	5,135	5,244	5,719	.3	.6
Wholesale trade	5,204	5,735	7,266	1.4	1.7
Retail trade	14,989	17,845	22,702	2.5	1.7
Finance, insurance, and real estate	4,975	6,297	7,917	3.4	1.7
Services	16,768	22,531	32,545	4.3	2.7
Government	15,947	16,711	18,329	.7	.7
Agriculture	3,401	3,252	2,917	- .6	- .8
Private households	1,326	1,241	1,215	- .9	- .1
Nonfarm self-employed and unpaid family workers	7,145	8,086	9,742	1.8	1.3

(continued)

The Labor Force (continued)

Employment By Major Sector: 1979, 1986 & Moderate Growth Projections to 2000 (continued)

	Percent distribution of wage and salary employment		
	1979	1986	Projected 2000
Total	--	--	--
Nonfarm wage and salary[1]	100.0%	100.0%	100.0%
Goods-producing	29.6	24.9	20.7
Mining	1.1	.8	- .6
Construction	5.0	5.0	4.9
Manufacturing	23.5	19.2	15.2
Durable	14.3	11.4	9.0
Nondurable	9.3	7.8	6.2
Service-producing[1]	70.4	75.1	79.3
Transportation and public utilities	5.7	5.3	4.8
Wholesale trade	5.8	5.8	6.1
Retail trade	16.8	18.0	19.1
Finance, insurance, and real estate	5.6	6.4	6.6
Services	18.7	22.7	27.3
Government	17.8	16.9	15.4
Agriculture	--	--	--
Private households	--	--	--
Nonfarm self-employed and unpaid family workers	--	--	--

Source: U.S. Labor Statistics: Monthly Labor Review (September 1987)

Occupational groups with the most highly trained workers in terms of educational attainment (including executive, administrative and managerial workers; professional workers; and technicians and related support workers) are projected to continue to grow more rapidly than the average for total employment. In 1986, these three groups accounted for 25% of total employment and are expected to account for almost 40% of the total job growth by 2000, bringing their total share to 27% based on the moderate growth projections.

In contrast, many factors, such as office and factory automation, changes in consumer demand, and import substitution are expected to lead to relatively slow growth or a decline for occupational groups requiring less education. Service workers, as noted below, are expected to grow at a faster rate than total employment, however, increasing from 14.8% of the 1986 total to 16.5% in the year 2000, not including household service workers. Large gains are also expected in wholesale and retail trade employees.

The Labor Force (continued)

Employment Trends By Broad Occupational Groups
(Numbers in thousands)

	1986		Projected 2000		Percent Change		
	Number	Percent	Number	Percent	1972 1979	1979 1986	1986 2000
Total employment	111,623	100.0%	133,030	100.0%	20.3%	10.9%	19.2%
Executive, administrative, and managerial workers	10,583	9.5	13,616	10.2	34.9	28.7	28.7
Professional workers	13,536	12.1	17,192	12.9	29.8	21.4	27.0
Technicians and related support workers	3,726	3.3	5,151	3.9	39.9	24.7	38.2
Salesworkers	12,606	11.3	16,334	12.3	24.3	24.4	29.6
Administrative support workers, including clerical	19,851	17.8	22,109	16.6	23.5	9.5	11.4
Private household workers	981	.9	955	.7	-23.0	-11.5	- 2.7
Service workers, except private household workers	16,555	14.8	21,962	16.5	25.7	16.0	32.7
Precision production, craft, and repair workers	13,924	12.5	15,590	11.7	21.7	6.5	12.0
Operators, fabricators, and laborers	16,300	14.6	16,724	12.6	8.7	- 9.2	2.6
Farming, forestry, and fishing workers	3,556	3.2	3,393	2.6	- 5.1	- 5.6	- 4.6

Source: U.S. Labor Statistics: Monthly Labor Review
(September 1987)

The U.S. Department of Labor, Bureau of Labor Statistics, compiles labor force, employment and earnings data from two major surveys: the Current Population Survey among households, and the Current Employment Statistics Survey among establishments (i.e. business locations).

The Household Data is developed by the Census Bureau in their Current Population Surveys, with the employment information analyzed by the BLS. The survey is conducted among 59,000 households, and provides information on the labor force, total employment, and unemployment. The Establishment Data is collected from payroll records maintained by over 290,000 establishments, employing over 38 million people. These records provide information on employment, hours, and earnings of workers on non-agricultural payrolls. (The Household Data includes agricultural employment.) Workers with more than one job are represented in each job held in the Establishment Data, but only counted once in the Household Data.

Current Employment

Current reports indicate that the employment level and the civilian unemployment rate were holding up very well contrary to pessimistic projections shortly after the October stock market crash. In December, 66.1% of the noninstitutional population age 16 years and over was in the labor force, bringing the total to 122.5 million people. The overall jobless rate was 5.7% and the civilian worker unemployment rate was 5.8%.

LABOR FORCE, EMPLOYMENT, EARNINGS

Current Employment

In December 1986, the jobless rate stood at 6.6%, and civilian employment numbered 110.7 million. While the population age 16 and over increased by close to 2.1 million from December 1986 to December 1987 (+1.1%), civilian employment (agricultural and other) increased by 3.1 million (12.8%). The number of unemployed decreased by 941,000 (-11.9%). The number of people in the resident Armed Forces held at 1.7 million as of December 1986 and 1987.

A Conference Board report issued at the end of December indicated that the U.S. economy is unlikely to generate more than 1.5 million new jobs in 1988, down sharply from about 3 million in 1987. More than 85% of all the new jobs will be in the service industries, with 15% in manufacturing or other goods-producing areas. About half the new jobs are expected to be part-time, temporary or other "contingent" positions. Contingent workers, which include part-time, temporary workers and a wide mix of jobs ranging from sub-contractors to consultants, now number about 30 million workers, according to the Board. In a recession, this group may be the first to feel the pinch of reduced employment.

Annual Averages

Employment Status of the Noninstitutional Population
16 Years & Over: 1980, 1987
(Annual average numbers in thousands)

	1987			1980		
	Total	Men	Women	Total	Men	Women
Population, total	184,490	88,476	96,103	169,349	80,877	88,472
In labor force (number)	121,602	67,784	53,818	108,544	62,932	45,611
Percent of population	65.9%	76.6%	56.1%	64.1%	77.8%	51.6%
Total employed	114,177	63,684	50,494	100,907	58,665	42,117
Civilian employment	112,440	62,107	50,334	99,303	57,186	41,461
Unemployed	7,425	4,101	3,324	7,637	4,267	3,370
Percent of labor force	6.1%	6.1%	6.2%	7.0%	6.8%	7.4%
Not in labor force	62,888	20,692	42,195	60,806	17,945	42,861

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, January 1988 (Household Data)

Of persons at work in nonagricultrual industries, the 1987 average showed 60% of the men and 40% of the women were full-time workers. Of the part time workers, 38% of the men and 22% of the women were in this classification for economic reasons rather than from choice.

Annual Averages (continued)

Full- and Part-Time Employment in Nonagricultural Industries By Sex and Age: 1987

(Numbers in thousands)

	Full-Time*			Part-Time**		
	1987			1980		
	Total	Men	Women	Total	Men	Women
Total, age 16 years & over	84,398	50,359	34,039	19,050	6,464	12,586
16 to 19 years	2,145	1,162	984	4,016	1,899	2,116
20 to 24 years	9,796	5,291	4,506	2,898	1,240	1,658
25 to 44 years	48,765	29,273	19,491	7,136	1,706	5,431
45 years and over	23,692	14,635	9,059	5,009	1,616	3,408

* Full-time employment numbers include workers who normally work full-time schedules but were employed part-time for economic reasons.

**Not including workers counted in accordance with above note (*).

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, January 1988 (Household Data)

Employment Status of the Civilian Population By Age, Sex and Race: December 1987

(Numbers in thousands)

	Population (Number)	% of Civilian Labor Force	Employed (Number)	Unemployed % of Labor Force	Not In Labor Force	
					Total*	In School**
WHITE						
Men: Age						
16 years & over	75,497	76.2%	54,729	4.9%	17,942	3,703
16 to 19 years	5,993	56.0	2,855	15.0	2,634	2,421
20 to 24 years	7,604	82.9	5,876	6.8	1,298	963
25 to 54 years	42,268	94.4	38,225	4.1	2,387	312
25 to 34 years	17,817	95.4	16,180	4.8	812	232
35 to 44 years	14,532	95.0	13,291	3.8	722	68
45 to 54 years	9,919	91.4	8,754	3.4	853	12
55 to 64 years	9,052	68.8	6,037	3.0	2,826	295
65 & over	10,581	16.9	1,735	2.8	8,796	--
Women:						
16 years & over	82,055	55.9	43,910	4.3	36,167	3,461
16 to 19 years	5,910	54.6	2,906	10.0	2,682	2,208
20 to 24 years	7,950	73.5	5,538	5.2	2,108	747
25 to 54 years	43,182	72.5	30,145	3.8	11,857	487
25 to 34 years	17,967	73.2	12,587	4.4	4,807	284
35 to 44 years	14,876	74.8	10,714	3.7	3,749	162
45 to 54 years	10,339	68.1	6,884	2.8	3,301	42
55 to 64 years	10,074	43.6	4,274	3.3	5,684	10
65 & over	14,938	17.4	1,074	2.5	13,837	9

(continued)

Annual Averages (continued)

Employment Status of the Civilian Population By Age, Sex and Race: December 1987

(Numbers in thousands)
(continued)

	Population (Number)	% of Civilian Labor Force	Employed (Number)	Unemployed % of Labor Force	Not In Labor Force Total*	Not In Labor Force In School**
BLACK & OTHER NONWHITE						
Men:						
16 years & over	11,837	71.1	7,536	10.5	3,417	nr
16 to 19 years	1,340	40.5	374	31.0	798	nr
20 to 24 years	1,457	77.0	921	17.9	335	nr
25 to 54 years	6,591	87.7	5,395	8.1	823	nr
25 to 34 years	3,022	88.8	2,387	11.1	339	nr
35 to 44 years	2,210	88.3	1,840	5.8	258	nr
45 to 54 years	1,459	84.5	1,169	5.2	227	nr
55 to 64 years	1,184	50.6	678	5.4	467	nr
65 & over	1,164	14.6	167	1.6	994	nr
Women:						
16 years & over	14,230	58.6	7,504	10.0	5,888	nr
16 to 19 years	1,365	37.3	363	28.9	855	nr
20 to 24 years	1,670	66.5	924	16.8	559	nr
25 to 54 years	8,061	73.1	5,405	8.2	2,171	nr
25 to 34 years	3,626	71.5	2,296	11.4	1,035	nr
35 to 44 years	2,652	77.4	1,929	6.0	599	nr
45 to 54 years	1,783	69.9	1,179	5.4	536	nr
55 to 64 years	1,456	46.6	662	2.3	778	nr
65 & over	1,679	9.1	151	1.8	1,526	nr

nr not reported
* Includes all civilians not seeking employment or working as of December.
** Does not include students who are in the Labor Force.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, January 1988 (Household Data)

Employment By Occupation By Sex: Annual Averages - 1983, 1987

	Number (thousands) 1987	Number (thousands) 1983	Percent Change	Percent Distribution 1987	Percent Distribution 1983
Men age 16 & over					
Total employed	62,107	56,787	+ 9.4%	100.0%	100.0%
Occupations:					
Managerial & professional specialty	15,457	14,215	+ 8.7	24.9	24.5
Executive, administrative, managerial	8,263	7,564	+ 9.2	13.3	12.8
Professional specialty	7,194	6,651	+ 8.2	11.6	11.7
Technical, sales, administrative support	12,378	11,078	+11.7	19.9	19.5
Technicians and related support	1,721	1,582	+ 8.8	2.8	2.8
Sales occupations	7,015	6,201	+13.1	11.3	10.9
Administrative support, incl. clerical	3,642	3,295	+10.5	5.9	5.8

(continued)

Annual Averages

Employment By Occupation By Sex: Annual Averages - 1983, 1987
(continued)

	Number (thousands) 1987	Number (thousands) 1983	Percent Change	Percent Distribution 1987	Percent Distribution 1983
Men age 16 & over (cont'd.)					
Service occupations	5,924	5,530	+ 7.1%	9.5%	9.7%
Private household	34	38	-10.5	*	0.1
Protective service	1,637	1,457	+12.3	2.6	0.1
Service, other than above	4,253	4,035	+ 5.4	6.8	7.1
Precision production, craft and repair	12,416	11,328	+ 9.6	20.0	19.9
Operators, fabricators, laborers	12,978	11,809	+ 9.9	20.9	20.8
Farming, forestry, fishing	2,954	3,108	- 5.0	4.8	5.5
Women age 16 & over					
Total employed	50,334	44,047	+14.3	100.0	100.0
Occupations:					
Managerial & professional specialty	12,286	9,659	+27.2	24.4	21.9
Executive, administrative, managerial	5,053	3,490	+44.8	10.0	7.9
Professional specialty	7,232	6,169	+17.2	14.4	14.0
Technical, sales, administrative support	22,704	20,187	+12.5	45.1	45.8
Technicians and related support	1,624	1,471	+10.4	3.2	3.3
Sales occupations	6,465	5,617	+15.1	12.8	12.8
Administrative support, incl. clerical	14,614	13,100	+11.5	29.0	29.7
Service occupations	9,130	8,326	+ 9.6	18.1	18.9
Private household	900	942	- 4.4	1.8	2.1
Protective service	271	215	+26.0	0.5	0.5
Service, other than above	7,960	7,170	+11.0	15.8	16.3
Precision production, craft and repair	1,153	1,000	+15.3	2.3	2.3
Operators, fabricators, laborers	4,508	4,282	+ 5.3	9.0	9.7
Farming, forestry, fishing	554	592	- 6.4	1.1	1.3

Source: U.S. Bureau of Labor Statistics: Handbook of Labor Statistics
(Bulletin 2217) Employment & Earnings,
January 1988

Well over half (56%) of the female population age 16 years and over is in the Civilian Labor Force, and women accounted for 44.8% of civilian employment in 1987. In total, there were over 50.3 million employed, on average, last year, almost 70% more than the 29.7 million counted in 1970. In that year, 43.3% of the female population was in the labor force, and women represented only 38% of civilian employment.

Annual Averages (continued)

Women's Share of Total Civilian Employment, Selected Years 1970-1987

Year	% of Population in Labor Force*	Civilian Employment of Women Number (thous.)	Civilian Employment of Women % of Total Employment
1970	43.3%	29,688	37.7%
1975	46.3	33,989	39.6
1980	51.5	42,117	42.4
1982	52.6	43,256	43.5
1985	54.5	47,259	44.1
1987	56.0	50,334	44.8

* Female population age 16 & over

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, January 1988 (Household Data)

The pattern in civilian employment by occupation in 1987 compared with 1983 shows the growth in the nation's career women. In 1987, women accounted for 44.3% of positions classified as managerial and professional specialty, up from 40.9% of the total in 1983. Within this classification, they held 37.9% of the executive, administrative, managerial position (up from 32.4% in 1983) and over half of the professional specialty spots (which includes engineers, architects, scientists, teachers, etc. The complete details are reported by the BLS in Employment & Earnings). In 1983, women accounted for 48.1% of the positions in this broad classification.

Percent of Total Occupations Accounted For By Women: Annual Average - 1983, 1987

	1987	1983
All employed civilians age 16 & over	44.8%	43.7%
Occupations		
Managerial & professional specialty	44.3	40.9
Executive, administrative, managerial	37.9	32.4
Professional specialty	50.1	48.1
Technical, sales, administrative support	64.7	64.6
Service	60.6	60.1
Precision production, craft and repair	8.5	8.1
Operators, fabricators, laborers	25.8	26.6
Farming, forestry, fishing	15.8	16.0

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, January 1988 (Household Data)
Handbook of Labor Statistics (Bulletin 2217)

As noted in the section covering recently-issued BLS projections on labor force and employment, women are expected to account for a growing share of the labor force but growth will slow down. The middle series of projections look for a total of 66 million women in the labor force by year 2000, up 13.2 million from 1986. This represents an annual rate of growth of 1.6% compared with a 3.3% rate of growth in the 1972-86 period, when young women of the baby boom were entering the labor force. Women's participation in the labor force, now at 56%, is now expected to increase more slowly in view of the age composition of the population, with more older women.

Earnings

While the gap in earnings between men and women has been closing, women still earn less than men. In 1979, women's average hourly earnings were 62% of men's. By 1986, women's average hourly earnings had grown to 68% of what men earned. The following table shows the gap in median weekly earnings in 1987 by profession or occupation. The major growth in women's jobs in the future is expected to be in the lower paying occupations, particularly service jobs, which is the most rapidly growing sector.

Measured in constant 1985 dollars, women's average annual earnings rose from $11,000 in 1955 to $15,500 in 1973, fell to $14,500 by 1981 but rose to $16,000 in 1986.

Median Weekly Earnings of Full-Time Wage & Salary Workers By Occupation & Sex: 1987

(Number in thousands)

	Men		Women	
	No. of Workers	Median Weekly Earnings	No. of Workers	Median Weekly Earnings
Managerial & professional	11,555	$ 636	9,339	$ 441
Executive, administrative, managerial	6,117	647	4,099	416
Professional specialty	5,438	625	4,965	458
Technical, sales, administrative support	9,241	453	15,439	293
Technicians & related support	1,533	500	1,264	368
Sales occupations	4,580	479	3,077	246
Administrative support, incl. clerical	3,128	402	11,098	294
Service occupations	4,143	296	4,171	199
Precision production, craft and repair	10,125	431	3,680	201
Operators, fabricators, laborers	10,926	344	3,716	231
Farming, forestry, fishing	1,171	219	142	191

Source: U.S. Bureau of Labor Statistics, Employment & Earnings, January 1988 (Household Data)

The average national wage for manufacturer production or nonsupervisory workers is about $9.91 an hour. Service workers generally average 85% of manufacturer wages, although within the service sector there is a wide range in the wage scale, from $11.76 an hour in transportation and public utilities down to $8.32 in business services; $6.05 in retail trade. In general, the increase in service jobs has been on the low end of the wage scale. A Federal Reserve Bank of Boston report showed that 41% of service workers earned less than $15,000 a year in 1986.

Distribution of Manufacturing Jobs & Service Jobs By Annual Earnings: 1986

Annual Earnings	Manufacturing	Service
Less than $15,000	28%	41%
$15,000 - $29,999	46	39
$30,000 or more	26	20
Total	100%	100%

Source: Economics Department, Federal Reserve Bank of Boston

Employment Status of Families

Reflecting the growth in employment during 1987, the Bureau of Labor Statistics reported that the number of families with members employed full time increased by 934,000 over the year, reaching nearly 48.4 million, or about 75% of all U.S. families. Although about 8% of the families had an unemployed member, the number of such families was down 800,000 in the fourth quarter of 1987 compared with the same 1986 period.

The number of employed mothers continued to increase moderately. In the fourth quarter, the mother was employed in 60% of the families with children under 18 years old. The proportion of families with employed mothers ranged from 53% for those with preschoolers to 67% for those where the youngest child was school age.

Median wage and salary earnings of families advanced by 4.9% to reach $579 a week. The median for married-couple families was $647 a week, 5% more than a year earlier. The median for two-earner families (usually the husband and the wife) was $782 a week, 60% higher than that for families where the husband was the sole earner. Earnings of families maintained by women continued to be about half those of married-couple families.

Summary of Labor Force Characteristics of Families

(Quarterly averages, not seasonally adjusted)
(Numbers in thousands)

	Fourth Quarter	
	1987	1986
Total families	64,178	63,518
With employed member(s)	52,284	51,476
% of total families	81.5	81.0
With member(s) employed full time	48,354	47,420
% of total families	75.3	74.7
With own children under 18 years old	31,504	31,608
% with employed parent(s)	88.8	88.5
% with employed mother	60.5	59.3
% with total families	49.1	49.8
With own children under 6 years old	14,416	14,437
% with employed parent(s)	87.9	86.9
% with employed mother	52.9	51.7
% of total families	22.5	22.7
Married couple families	50,833	50,625
Some member employed	42,591	42,237
% of married couple families	85.1	85.1
Member employed: % of total		
Husband only	22.4	23.1
Wife only	4.7	4.9
Both	48.8	47.4
Families maintained by women*	10,703	10,450
% of all families	16.7	16.4
With at least one member employed	7,510	7,217
Householder only employed	3,837	3,759
% of families maintained by women	35.8	36.0
Families maintained by men*	2,642	2,444
% of all families	4.1	3.8

* no spouse present

Source: U.S. Bureau of Labor Statistics: Employment & Earnings Characteristics of Families: Fourth Quarter 1987

Employment Status of Families (continued)

Families With Wage & Salary Earners By Race & Median Weekly Earnings Annual Averages, 1987

	Families Number (thous.)	Families Percent	Median Weekly Earnings
WHITE			
Total families with earners*	36,555	100.0%	$ 592
One earner	15,554	42.5	377
Two or more earners	21,001	57.5	761
Married couple families	30,095	100.0	647
One earner:**	11,385	37.8	416
Husband	8,784	29.2	485
Wife	1,946	6.5	231
Two or more earners	18,710	62.2	785
Husband & wife only	13,232	44.0	748
Families maintained by women	4,959	100.0	329
One earner	3,285	66.2	265
Two or more earners	1,674	33.8	518
Families maintained by men	1,501	100.0	492
One earner	884	58.9	373
Two or more earners	617	41.1	695
BLACK			
Total families with earners*	4,942	100.0%	412
One earner	2,452	49.6	253
Two or more earners	2,489	50.4	623
Married couple families	2,768	100.0	529
One earner:**	924	33.4	289
Husband	581	21.0	335
Wife	264	9.5	215
Two or more earners	1,843	66.6	675
Husband & wife only	1,318	47.6	646
Families maintained by women	1,822	100.0	284
One earner	1,305	71.6	228
Two or more earners	517	28.4	495
Families maintained by men	352	100.0	383
One earner	223	63.3	281
Two or more earners	129	36.7	544

* Excludes families where the husband, wife, or householder is self-employed.
**The one earner may be someone other than husband or wife.

Source: U.S. Bureau of Labor Statistics: Employment & Earnings Characteristics of Families: Fourth Quarter 1987

INCOME/WEALTH

Personal Income/Outlays

In real terms, when measured in a constant dollar value, American's after-tax incomes were up only 1.2% in 1987 compared with 1986, according to unrevised annual data on the Gross National Product issued by the Department of Commerce. This was the poorest showing since the recession in 1982. In 1986, disposable income was up 4.0% over 1985; in 1985 the annual increase was 2.9%. In 1982, however, real disposable income managed a rise of only 0.6%.

Real per capita disposable income was up a slight 0.3% in 1987 compared with 1986, following the 3.1% gain reported for 1986 over 1985. Consumer spending, after adjusting for inflation, rose just 1.8% last year, based on a preliminary Department of Commerce report. This was less than half the growth rate of the previous two years. Economists, in general, expect a low growth rate in consumer spending in 1988.

A high consumer debt burden and low personal savings rate have contributed to this outlook. In 1987, the savings rate at 3.8% of disposable income was the lowest since the 3.1% rate in 1947, and compares with the 4.3% rate in 1986. However, the rate in the 1987 fourth quarter was 4.8%, compared with 3.6% in the fourth quarter of 1986 and a rate of 2.8% in the 1987 third quarter. Consumers may have been spurred by the stock market crash to step up savings as the outlook for the economy darkened.

Fourth quarter 1987 revised figures issued by the Commerce Department show personal consumption expenditures at $3,019.2 billion (seasonally adjusted annual rate) in current dollars. This represented a gain of 0.3% compared with the rate reported for the third quarter and was 5.6% over the 1986 fourth quarter rate, in current dollars. Personal consumption (which accounts for two-thirds of the GNP fell by an inflation-adjusted 3.1% in the fourth quarter, according to Department of Commerce revised figures, after rising 5.4% in the third quarter of 1987. Spending on durable goods, those products intended to last more at least three years, fell a sharp 20.4%, while spending on nondurable goods declined 2.6%. Services, however, continued their growth, with gains in spending in real terms reported at 2.8% in the 1987 fourth quarter.

Unreported Income

The "underground economy" in the U.S. represents such a large slice of national income that it cannot be ignored. This is a huge amount of income that goes unreported to escape taxation, or criminal charges, or both. In current dollars, the amount of unreported cash going underground grew from an average of $52.2 billion a year in 1971-75 to an average of $370.7 billion a year in 1981-85, according to estimates compiled by James J. O'Leary, economic consultant to the United States Trust Co.

According to this source, the total reached a peak of $558.4 billion in 1984, dropping to $431.7 billion in 1985, due in part to stricter IRS requirements for banks and other financial institutions to report interest and dividends. Much of the unreported income comes from drug dealing, burglaries, illegal gambling and other criminal activities, but much of it is unreported or collected "off the books" in businesses and professions. The rapidly growing service sector has offered increasing opportunities to deal in cash.

Tax law changes starting in 1987 have been designed to pick up some of the heretofore unreported income.

INCOME/WEALTH

Poverty Status

A Census Bureau report based on the March 1987 Population Survey showed a total of 32.4 million persons classified as "in poverty"--a threshold determined each year to reflect changes in the Consumer Price Index which varies by family size and composition. For example, the average poverty threshold for a family of four in 1986 was $11,203, $10,989 in 1985.

Whites represented 69% of the 1986 poor; Blacks, 28%, and the remainder were persons of other races, principally Asians and American Indians. The poverty rate was 11% for Whites, 31% for Blacks, 16% for other races.

Personal Income/Outlay Profile

Personal Income by Source & Outlays: 1982, 1986, 1987
(Billions of current dollars, except where noted)

				% of Total		
	1987(p)	1986(r)	1980	1987	1986	1980
Personal income	$3,745.8	$3,543.3	$2,258.5	100.0%	100.0%	100.0%
Wages & salaries	2,212.7	2,089.1	1,372.0	59.1	59.1	60.7
Commodity-producing inds.	641.2	623.3	470.7	17.1	17.6	20.8
Manufacturing	484.0	470.5	355.6	12.9	13.3	15.7
Distributive industries	522.8	497.1	335.5	14.0	14.1	14.8
Service industries	627.3	573.9	305.6	16.7	16.2	13.5
Government & government enterprises	421.5	394.8	260.2	11.2	11.2	11.5
Other labor income	210.2	201.1	138.4	5.6	5.7	8.7
Proprietors' income*	327.8	289.8	180.7	8.7	8.2	11.3
Rental income of persons*	18.5	16.7	6.6	0.5	0.5	0.3
Personal dividend income	87.5	81.2	52.9	2.3	2.3	2.3
Personal interest income	515.8	497.6	271.9	13.8	14.1	12.0
Transfer payments**	543.0	518.3	324.7	14.5	14.7	14.4
Less: Personal contributions for social insurance	169.9	159.6	88.6	4.5	4.5	3.9
Personal tax & non-tax payments	564.7	512.2	340.5	15.1	14.5	15.1
Equals: Disposable personal income	3,181.1	3,022.1	1,918.0	84.9	85.5	84.9
Less: Personal outlays	3,060.9	2,891.5	1,781.1	81.7	81.8	78.9
Personal consumption expenditures	2,966.0	2,799.8	1,732.6	79.2	79.2	76.7
Interest paid by consumers to business	93.5	89.9	47.4	2.5	2.5	2.1
Personal transfer payments to foreigners (net)	1.5	1.7	1.1	#	#	#
Equals: Personal saving	120.2	130.6	136.9	3.2	3.7	6.1
Addenda:						
Disposable personal income:						
Total, billions of 1982 dollars	2,676.1	2,645.1	2,214.3	—	—	—
Per capita:						
Current dollars	13,048	12,508	8,421	—	—	—
1982 dollars***	10,976	10,947	9,722	—	—	—
Population (millions)	243.8	241.6	227.8	—	—	—
Personal saving as a % of disposable income	3.8%	4.3%	7.1%	—	—	—

(footnotes continued)

Personal Income/Outlay Profile

(footnotes from previous table)

(p) preliminary
(r) revised
* Inventory valuation and/or capital consumption adjustments are included.
** Transfer payments include old-age, survivors', disability and health insurance benefits; government insurance benefits, etc.
*** Disposable income in 1982 dollars equals the current-dollar figure divided by the implicit price deflator for personal consumption expenditures.
# Less than 0.1%

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Per Capita Income

Per capita disposable income measured in 1982 dollars registered a slight gain of 0.3% in 1987 compared with 1986, following the 3.1% gain noted for 1986 over 1985. The rate of growth in real per capita disposable income over the years has been quite erratic, as noted below. The biggest year-to-year gain in recent years was in 1984 compared with 1983 (+4.9%).

The 1987 level represented a gain of about 13% compared with 1980. This rise may mask two important facts: much of the gain in per capita, as well as family income, can be attributed to the increase in two-earner households and there has been a major redistribution of income, with the highest income sector of the population claiming a larger share of income.

Per Capita Disposable Income: 1980-1987

Year	Current Dollars	1982 Dollars	Year-to-Year % Change in 1982 Dollars
1980	$ 8,421	$ 9,722	- 1.1%
1981	9,243	9,769	+ 0.5
1982	9,724	9,724	- 0.5
1983	10,340	9,930	+ 2.1
1984	11,257	10,419	+ 4.9
1985	11,872	10,622	+ 1.9
1986	12,508	10,947	+ 3.1
1987(p)	13,048	10,976	+ 0.3

(p) preliminary

Source: U.S. Department of Commerce, Bureau of Economic Analysis

INCOME/WEALTH

Money Income of Individuals

An advance report from the March 1987 Population Survey conducted by the Census Bureau covered details on individuals with income, as well as family income. This study showed that 94.2% of the population age 15 and over had money income in 1986, including 94.5% of the males and 90.2% of the females. This includes money income from all sources (earnings, interest, dividends, etc.).

Median Income of Persons Age 15 Years & Over
By Selected Characteristics: 1986
(Numbers in thousands)

	Males		Females	
	No. With Income	Median Income	No. With Income	Median Income
Total	84,471	$ 17,114	87,822	$ 7,710
By race:				
White	73,827	18,060	75,587	7,760
Black	8,285	10,822	9,819	6,566
Hispanic	5,870	11,532	5,096	6,338
By region:				
Northeast	17,707	18,929	19,072	8,020
Midwest	20,640	17,438	21,957	7,265
South	28,818	15,466	29,523	7,286
West	17,306	18,302	17,270	8,180

Source: U.S. Bureau of the Census: Current Population Reports, Money Income & Poverty Status of Families & Persons in the U.S.: 1986 (Advance data from the March 1987 Current Population Survey) (P-60, No. 157)

Men in the 45-54 age group, accounting for 13% of covered males with incomes, are the most prosperous, having a median income of $27,756 in 1986 compared with the overall median for males reported at $17,114. As a group, these men had the highest concentration in the $50,000-and-up income bracket reported by age groups, (14.7%), and they represented 27% of all those in this income bracket.

The larger group, men 35-44 years of age which includes the leading edge of the baby boom generation, had the second highest median income -- $26,172. Within this group, 12.2% had incomes of $50,000 or more, representing about a third of covered males in this income bracket.

Among females age 15 years and over, the highest median -- $11,064 -- was reported for women age 35 to 44 years. This compares with the overall median of $7,610 for all covered females (and the median of $26,172 reported for men of this age). Few women have their own incomes of $50,000 or more (less than 1%). Women age 35 to 44 registered the biggest share, based on age groups, of those with incomes upwards of $30,000 (32.2%).

Money Income of Individuals (continued)

Number & Percent of Men & Women Age 15 Years & Over By Total Money Income: 1985

(Numbers in thousands)

		Age Groups (years)						
	Total	15-19	20-24	25-34	35-44	45-54	55-64	65 & over
MALES, total	89,368	9,193	9,499	21,141	16,529	11,151	10,277	11,578
With income	84,471	6,055	8,943	20,600	16,289	10,966	10,128	11,490
Under $10,000	25,605	5,682	4,805	4,140	2,343	1,564	2,204	4,865
$10,000-$19,999	21,890	329	2,997	6,663	3,221	2,008	2,591	4,088
$20,000-$29,999	15,854	30	893	5,169	3,944	2,405	2,058	1,355
$30,000-$49,999	15,032	12	224	3,770	4,763	3,366	2,137	761
$50,000 & over	6,090	3	21	856	2,018	1,633	1,137	432
Median income	$17,114	$1,929	$ 8,961	$19,162	$26,172	$27,756	$21,034	$11,544
Mean income	$21,822	$3,127	$10,464	$21,478	$29,709	$31,717	$26,809	$16,115
MALES, total %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
With income	94.6	65.9	94.2	97.5	98.6	98.4	98.6	99.3
Under $10,000	28.7	61.8	50.6	19.6	14.2	14.1	21.5	42.1
$10,000-$19,999	24.5	3.6	31.6	31.6	19.5	18.0	25.3	35.3
$20,000-$29,999	17.8	0.5	9.4	24.5	23.9	21.6	20.1	11.7
$30,000-$49,999	16.9		2.4	17.9	28.9	30.2	20.8	6.6
$50,000 & over	6.9		0.3	4.1	12.2	14.7	11.1	3.8
FEMALES, total	97,320	8,994	9,859	21,494	17,103	11,866	11,606	16,398
With income	87,822	5,790	8,952	19,795	15,919	10,791	10,448	16,126
Under $10,000	51,553	5,583	6,035	9,646	7,369	5,250	6,152	11,525
$10,000-$19,999	22,051	191	2,434	6,112	4,463	3,039	2,557	3,257
$20,000-$29,999	9,486	11	414	2,873	2,561	1,636	1,126	867
$30,000-$49,999	3,899	3	57	1,022	1,250	716	480	371
$50,000 & over	834	--	10	144	276	151	135	116
Median income	$ 7,610	$1,854	$ 6,554	$10,310	$11,064	$10,380	$ 7,377	$ 6,425
Mean income	$10,741	$2,698	$ 7,954	$12,043	$13,710	$12,750	$10,905	$ 9,195
FEMALES, total %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
With income	90.3	64.4	90.8	92.1	93.1	91.0	90.1	98.4
Under $10,000	53.0	62.1	61.3	44.9	43.1	44.3	53.0	70.3
$10,000-$19,999	22.7	2.2	24.7	28.5	26.1	25.7	13.5	19.9
$20,000-$29,999	9.8	0.2	4.2	13.4	15.0	13.8	9.7	5.3
$30,000-$49,999	4.0	0.1	0.6	4.8	7.3	6.1	4.2	2.3
$50,000 & over	0.9	--	0.1	0.7	1.7	1.3	1.2	0.7

Note: The number of civilian men with earnings from work was 68.7 million; their median earnings were $18,782. For women, comparable figures were 57.7 million, and $10,016.

Source: U.S. Bureau of the Census: Current Population Reports, Money Income & Poverty Status of Families & Persons in the U.S. (Advance data from the March 1987 Current Population Survey (P-60, No. 157)

Money income is highly concentrated among young adults. Based on Census data covering average incomes by age groups within the population over 15 years, 50.3% of male income was in the hands of men age 25 to 44 years. Comparable figures for women showed an estimated 48.4% of female income concentrated among women age 25 to 44 years.

Money Income of Individuals (continued)

Share of Total Income of Individuals Age 15 & Over By Sex & Age Group: 1986

(Numbers in thousands, income in billions of $)

	Men				Women			
	Number	%	Income	%	Number	%	Income	%
Total	89,868	100.0%	$1,843.4	100.0%	97,320	100.0%	$943.3	100.0%
With no income	4,897	6.0	--	--	9,498	9.8	--	--
With income	84,471	94.0	--	--	87,822	90.2	--	--
Age group: (years)								
15 - 19	6,055	6.7	18.9	1.0	5,790	5.9	15.6	1.7
20 - 24	8,943	10.0	93.5	5.1	8,952	9.2	71.2	7.5
25 - 34	20,600	22.9	442.4	24.0	19,795	20.3	238.4	25.3
35 - 44	16,289	18.1	483.9	26.3	15,919	16.4	218.2	23.1
45 - 54	10,966	12.2	347.8	18.9	10,791	11.1	137.6	14.6
55 - 64	10,128	11.3	271.5	14.7	10,448	10.7	113.9	12.1
65 & over	11,490	12.8	185.2	10.0	16,126	16.6	148.3	15.7

Source: Based on U.S. Bureau of the Census reports covering mean income for persons with income

Regional Distribution & Household Status of Individuals With Income: 1986

(Numbers in thousands)

	Men			Women		
	Number	%	Median Income	Number	%	Median Income
U.S. total	84,471	100.0%	$17,114	87,822	100.0%	$7,610
Northeast	17,707	21.0	18,929	19,072	21.8	8,020
Midwest	20,640	24.5	17,438	21,957	25.0	7,265
South	28,818	34.2	15,466	29,523	33.7	7,286
West	17,306	20.5	18,302	17,270	19.7	8,180
Household status:						
In families	70,125	83.1	17,477	70,489	80.3	6,941
Householder (head)	50,752	60.1	22,171	12,954	14.8	9,626
Spouse of householder	2,883	3.5	20,392	44,003	50.1	7,436
Other relative	16,490	19.6	5,344	13,531	15.4	4,181
Unrelated subfamilies	184	0.3	7,774	519	0.6	6,109
Unrelated individuals	14,163	16.8	15,653	16,814	19.2	10,443

Source: U.S. Bureau of the Census: Current Population Reports, Money Income & Poverty Status of Families & Persons In the U.S. (P-60, No. 157)

The Wealthiest Individuals

In 1986, the number of males (age 15 and over) with incomes of $50,000 or more totaled 6,090,000 (2,197,000 had incomes of $75,000 or more), according to the Census Bureau. Among females of this age, 834,000 had incomes of $50,000 and up; 255,000 were in the $75,000-and-over category.

INCOME/WEALTH

Household Income

The major source of money income of U.S. households is earnings from employment -- accounting for $78 of every $100, according to the Department of Commerce. The three other most important sources are interest, dividends and other asset income. Asset income provided about $8 out of every $100 received. Social Security provided about $7, and other pensions about $4; miscellaneous sources, $3 in 1985.

Total money income of the Nation's 89,479,000 households in 1986 had a median value of $24,897, a mean of $30,759 in current dollars. The median was 5.4% above the 1985 figure and a third higher than in 1980, in current dollars. The highest median income in 1986 was among households in the West -- $27,001; the lowest in the South -- $22,578.

Distribution of Households in March 1987 By Total Money Income By Region of the U.S. in 1986
(Numbers in thousands)

1987	U.S. Total	Northeast	Midwest	South	West
Total number	89,479	18,873	21,973	30,620	18,014
Money Income					
Under $10,000	17,130	3,430	4,164	6,618	2,918
$10,000-$14,999	9,854	1,743	2,407	3,742	1,962
15,000- 19,999	9,303	1,974	2,312	3,283	1,735
20,000- 24,999	8,617	1,758	2,163	3,019	1,676
25,000- 29,999	7,733	1,596	2,051	2,506	1,580
30,000- 34,999	7,078	1,421	1,821	2,356	1,480
35,000- 39,999	6,089	1,308	1,592	1,862	1,327
40,000- 49,999	8,667	1,936	2,146	2,781	1,804
50,000- 74,999	10,085	2,379	2,384	2,970	2,352
75,000 & over	4,922	1,327	932	1,484	1,179
Median income	$24,897	$26,494	$24,851	$22,578	$27,001
Mean income	30,759	32,982	29,645	28,846	33,040

Median Household Income By Age of Householder in 1986
(Number of households in thousands)

		Age of Householder*					
	Total	Under 25 Years	25-34	35-44	45-54	55-64	65 & Over
Total number of households	89,479	5,197	20,502	18,703	13,211	12,868	18,998
Median income	$24,897	$15,310	$25,898	$32,787	$35,660	$26,776	$13,845

* The householder is defined as the first person listed in whose name the home is owned or rented.

Source: U.S. Bureau of the Census, Current Population Reports _Money Income & Poverty Status of Families & Persons in the U.S.: 1986_ (Advance Data from the March 1987 Current Population Survey) (Series P-60, No. 157)

Household Income (continued)

Households headed by individuals 35 to 54 years of age are at the peak in earning power and total money income, and as noted in population growth data, this group will continue to increase as the baby boom moves along the age scale. The Conference Board estimates the group controls 45% of the Nation's personal income. Working wives are a major factor in this group's high income level.

In 1986, as noted above, the median income for households headed by individuals age 55 to 64 was about 8% above the median for all households. Moreover, this group's discretionary income -- that portion of household income available for personal consumption -- was 16% above the average, the highest of any age group.

Householders age 65 and older also have above-average discretionary income, although their median household income in 1986 was only $13,845. While low, this level is 18% higher, in constant dollars, than in 1980 -- representing better than three times the rate of increase for all households. Overall, the mature market represents more of the top of income scale than the bottom. Census Bureau data indicates only one-sixth of people living in poverty are age 55 or older; 25% of the 15 million U.S. households with an income of $50,000 or more in 1986 were headed by individuals age 55 or older.

Status of Children

The 1987 Current Population Survey taken by the Census Bureau showed about 26% of the children under 18 years of age, who were living with one or both parents, were in families with an income of $40,000 or more. This compares with 23% reported a year earlier.

Distribution By Family Income in 1986
Of Children Under 18 Years of Age Living With One or Both Parents
(Numbers in thousands)

Family Income	Total Under 18		Under 6 Yrs.		6 to 11 Yrs.		12 to 17 Yrs.	
	No.	%	No.	%	No.	%	No.	%
Number of children	61,143	100.0%	21,340	100.0%	19,591	100.0%	20,211	100.0%
Under $10,000	11,630	19.0	5,060	23.7	3,692	18.8	2,879	14.2
$10,000-$14,999	5,824	9.5	2,275	10.7	1,806	9.2	1,743	8.6
$15,000-$24,999	11,936	19.5	4,405	20.6	3,933	20.1	3,598	17.8
$25,000-$39,999	16,125	26.4	5,355	25.1	5,311	27.1	5,459	27.0
$40,000-$49,999	6,480	10.6	1,839	8.6	2,132	10.9	2,509	12.4
$50,000 & over	9,147	15.0	2,407	11.3	2,717	13.9	4,023	20.0
Mean income	$29,942		$26,250		$29,600		$34,172	

Source: U.S. Bureau of the Census, Current Population Reports, Marital Status and Living Arrangements: March 1986 (Series P-20, No. 418)

Income Distribution

A major study of family income distribution compiled by the Congressional Budget Office concludes that there has been a widening of the gap between high- and low-income families. Adjusting income to take account of inflation and changes in size of the American family, the study concluded that the median adjusted family income rose 20% between 1970 and 1986, chiefly due to the rise in the number of workers per family. Married couples with children were nearly twice as likely to have two full-time workers in 1986 as in 1970. However, single mothers with children and families headed by people under 25 years old were said to be worse off in 1986 than in 1970.

Overall, the median adjusted income of families in 1986, according to the Congressional Budge Office, attained the highest level on record in 1986 (specific dollar figures were not reported). For elderly families, the median adjusted income rose more than 50% from 1970 to 1986. By contrast, for families headed by people under 25 years old, the median dropped 18%.

Another Congressional Budget Office report, issued in November 1987, which analysed the impact of Federal taxes, found that the poorest one-tenth of Americans will pay 20% more of their earnings in Federal taxes next year than they did in 1977, while the richest will pay almost 20% less. The poorest 1% of taxpayers will see their share of income devoted to a Federal tax increase from 8% to 9.6%, a 20% rise, due in large part to increases in excise taxes and Social Security deductions. The wealthiest 10% will see Federal taxes take 25% of income in 1988, down from 26.7% a decade earlier, representing a 6.4% cut.

Tax changes are reinforcing the trend to an increasing share of income held by the wealthy. According to the Congressional Budget Office study, by the end of 1988, 80% of families will undergo a decline in adjusted income compared with 1977, but the richest 10% will see an average increase of 16%, the top 5% will average a 23% rise and the richest 1% will see their income grow by 50%. (The New York Times, November 12, 1987).

The tabulation of tax bite by age suggests that as the baby boom moves into middle age, not only will their income increase but so will their tax burden.

Based on the Current Population Survey in March 1987, the Census Bureau reported that the top fifth of families in terms of income accounted for 43.7% of aggregate income in 1986; the top 5% had a 17% share.

Share of Aggregate Income in 1986 of Families & Unrelated Individuals
Total & By Region

		Percent Distribution of Aggregate Income						
	Number (thous.)	Lowest Fifth	Second Fifth	Third Fifth	Fourth Fifth	Top Fifth	Top 5%	Mean Income
Families								
Total	64,491	4.6%	10.8%	16.8%	24.0%	43.7%	17.0%	$34,924
Northeast	13,367	4.9	11.2	16.9	24.0	43.1	16.5	38,089
Midwest	15,844	4.9	11.5	17.4	24.1	42.0	15.9	33,891
South	22,536	4.3	10.2	16.4	24.0	45.1	17.9	32,714
West	12,744	4.8	10.9	16.8	24.9	4[illegible]	16.9	36,799

(continued)

Income Distribution

Share of Aggregate Income in 1986 of Families & Unrelated Individuals
Total & By Region
(continued)

	Number (thous.)	Percent Distribution of Aggregate Income Lowest Fifth	Second Fifth	Third Fifth	Fourth Fifth	Top Fifth	Top 5%	Mean Income
Unrelated Individuals								
Total	31,679	3.5	8.8	15.2	24.5	48.1	19.1	16,030
Northeast	6,766	4.0	8.7	15.0	24.1	48.2	20.1	17,086
Midwest	7,578	3.8	9.1	15.4	24.5	47.2	18.3	15,300
South	10,023	3.3	8.5	15.0	24.2	49.0	19.4	14,735
West	7,312	3.2	9.0	15.7	25.1	47.0	18.0	17,586

Source: U.S. Bureau of Census, Current Population Reports
Money Income & Poverty Status of Families & Persons in the U.S.: 1986 (Advance Data form the March 1987 Current Population Survey) (Series P-60, No. 157)

The Census Bureau has issued a detailed report on many aspects of wealth distribution in their report, Household Wealth & Asset Ownership: 1984. Among the findings in this report, based on a survey conducted in September through December 1984, households with a monthly income of $4,000 or more from all sources by all household members controlled 38% of net worth (wealth).

Median Net Worth By Income & Distribution of Net Worth,
By Monthly Household Income
(Excludes Group Quarters)

Monthly Household Income	No. of Households (thousands)	Median Net Worth	Distribution of Net Worth
Total	86,790	$ 32,677	100.0%
Less than $900	22,297	5,080	9.7
$900 to $1,999	26,599	24,647	20.5
$2,000 to $3,999	27,173	46,744	31.8
$4,000 or more	10,270	123,474	38.0

Source: U.S. Bureau of the Census, Current Population Reports
Household Economic Studies (Series P-70, No. 7)

In the aftermath of the stock market crash in October 1987, attention of economists and marketers is focused on the extent to which consumers will be affected by what is termed a "negative wealth effect", bringing on a recession. Some of the past gains in consumer spending were reflections of optimism based on the strong equity market, even though the above noted study of income distribution indicated that only 20% of the U.S. households owned any stocks or mutual funds, and these represented 6.8% of all households' net worth.

INCOME/WEALTH

According to Lawrence Sommers of Harvard University (The Sommers Letter) a one point rise in the Dow equaled about $1.3 billion in realized and unrealized capital gains for the household sector, creating over $1.5 trillion of wealth in the past five years, while rising paper wealth increased consumption by 3 cents to 6 cents for each dollar of appreciation. Much of this wealth, and gains in consumer spending attributable to the "wealth effect" vanished with the 500 point drop in the Dow. However, the impact may be mitigated by what is called a "confidence building effect" of such upbeat developments as a reduction in the deficit, lower interest rates, a stable economy, etc.

CREDIT/DEBT/PAYMENTS

The level of consumer debt, as well as the low savings rate averaged in recent years, are aspects affecting the current consumer market, as well as confidence levels affected by prospects of growth in personal income and developments in the economy.

In December 1987, consumer debt rose by $4.5 billion, the biggest monthly gain in three months, according to the Federal Reserve Board. This placed total consumer debt at $612.57 billion, up 6% from the end of 1986. The annual rate of increase in December was 8.8%; for 1987 as a whole, installment credit advanced 6% (compared with a 10.5% rise in 1986). Automobile and revolving credit categories rose faster -- at rates of 11.7% and 19.4%, respectively, in December 1987.

The Federal Reserve Board has made a detailed analysis of methods of payment utilized by American families in 1986, with data on methods used by selected family characteristics. Details on this study are published in the Federal Reserve Bulletin (March 1987). This followed a similar study covering 1984.

Methods of Payment as a Percentage of Aggregate Household Expenditures

	1986	1984
Main checking account	39%	45%
Other checking account	9	7
Savings/MMA	8	10
Cash	34	30
Credit cards	8	7
Money orders	2	1
Total	100%	100%

Source: Federal Reserve Board

CONSUMER PRICES

The Consumer Price Index for all urban consumers, measured by the Bureau of Labor Statistics, Department of Labor, at the end of 1987 was up 4.4% over the level at the end of 1986. Much of the increase was attributed to the declining value of the dollar which makes imported products more expensive (apparel prices were up 4.9%). But above-average increases were also reported for medical care, transportation, and services. Wholesale prices in 1987 averaged 2.2% higher in 1987 than in 1986, but the trend appeared to be upward as we entered 1988. Domestic producers appear to be raising prices in the wake of higher import prices, and many are also paying for imported components, machinery and equipment.

The Government's implicit price deflator covering personal consumption expenditures was up 4.0% in 1987 compared with 1986, after a 2.2% rise in 1986, a gain of 3.4% in 1985; 3.8% in 1984. This measurement, by the Bureau of Economic Analysis, takes into consideration changes in consumption patterns, and covers all spending.

CONSUMER SPENDING

Preliminary figures on personal consumption expenditures for all goods and services in 1987 were reported at $2,966.0 billion in current dollars, up 5.9% compared with 1986, and representing 66% of the Gross National Product both years.

In 1982 dollars, eliminating the effects of inflation, personal consumption expenditures in 1987 were up only 1.8%. This compares with real growth of 4.15% recorded for 1986, and 4.6% in 1985 compared with 1984.

Personal Consumption Expenditures By Major Classifications: 1983-1987
(Billions of current dollars)

	1987	1986	1985	1984	1983
Total personal consumption expenditures	$2,966.0	$2,799.8	$2,629.4	$2,430.5	$2,234.5
Durable goods, total*	413.9	402.4	368.7	335.5	289.1
Motor vehicles & parts	194.5	194.9	177.6	157.4	130.4
Furniture & household equip.	146.3	139.9	128.7	118.8	107.1
Other	73.1	67.6	62.4	59.3	51.6
Nondurable goods, total	980.4	939.4	913.1	867.3	816.7
Food	514.5	497.8	472.8	448.5	421.9
Clothing & shoes	176.5	167.5	157.2	146.7	135.1
Gasoline & oil	79.9	75.3	92.6	90.0	90.2
Other	209.6	198.8	190.5	182.1	169.5
Services	1,571.6	1,458.9	1,347.5	1,227.6	1,128.7

* Durable goods have an expected span of use of at least three years.

Source: U.S. Bureau of the Census

The Bureau of Labor Statistics conducts annual surveys of Consumer Expenditures which are designed to measure differences in U.S. household spending patterns since 1979, based on income levels, age of householder, size of household, income levels, etc.

CONSUMER SPENDING

Detailed information on personal consumption expenditures are compiled annually by the Bureau of Economic Analysis, U.S. Department of Commerce. The latest available report covering 1986, with comparisons for earlier years, is summarized in the following table.

The following covers the value at retail of all goods (new and used) reaching the consumer through any channel, i.e. retail outlets, premiums, direct sale by manufacturers and wholesalers, raffles, fairs, etc.

Personal Consumption Expenditures by Selected Product Categories: 1983-1986

	Billions of Current Dollars (add 000,000)			
	1986(p)	1985(r)	1984(r)	1983(r)
Total disposable personal income	$2,971.6	$2,828.0	$2,670.6	$2,428.1
Total personal consumption expenditures	2,799.8	2,629.4	2,430.5	2,234.5
Durable goods	402.4	368.7	335.5	289.1
Nondurable goods	939.4	913.1	867.3	816.7
Services	1,458.0	1,347.5	1,227.6	1,128.7
Selected Expenditures				
Food & non-alcoholic beverages, total*	497.8	472.8	448.5	421.9
Purchased for off-premise consumption	333.3	320.6	305.8	290.4
Purchased meals & beverages (on-premise consumption)	155.2	143.2	134.1	123.5
Tobacco products	34.2	32.0	30.5	28.2
Alcoholic beverages (for on & off-premise consumption)	59.0	56.2	52.9	52.2
Toilet articles & preparations	24.2	23.0	21.9	20.3
Barbershops, beauty parlors, health clubs, spas	17.2	15.8	14.5	13.8
Drug preparations & sundries (not incl. products dispensed by doctors, hospitals, etc.)	29.7	27.9	26.3	24.4
Clothing & accessories, not incl. standard military clothing, jewelry or footwear (Luggage is included)	142.8	133.9	125.0	114.7
Women's, girls', infants'	96.4	90.2	83.6	76.3
Women's (age 16 & over) (e)	76.0	71.1	65.9	60.2
Girls', children's (e)	20.4	19.1	17.7	16.1
Men's & boys'	46.4	43.7	41.4	38.4
Men's (e)	37.5	35.3	33.5	31.0
Boys' (e)	8.9	8.4	7.9	7.4
Footwear, total	24.6	23.2	21.6	20.2
Men's (e)	7.5	7.0	6.5	6.1
Women's (age 16 & over) (e)	12.1	11.5	10.7	10.0
Boys', girls' (e)	5.0	4.7	4.4	4.1
Jewelry & watches	23.5	20.8	19.9	18.0
Wheel goods, durable toys, sports equip. boats, etc.	27.0	25.9	24.8	20.4
Nondurable toys & sport supplies	21.8	20.9	19.7	18.0
Books & maps	8.7	8.2	7.8	7.2

(continued)

CONSUMER SPENDING

Personal Consumption Expenditures by Selected Product Categories: 1983-1986
(continued)

	Billions of Current Dollars (add 000,000)			
	1986(p)	1985(r)	1984(r)	1983(r)
Homefurnishings, total **	154.6	142.7	132.2	119.5
Furniture & bedding (springs, mattresses, etc.)	30.6	28.1	26.5	23.8
Major appliances, electric housewares	24.7	23.5	21.6	19.6
Dinner & tableware, glassware, utensils	13.4	12.8	12.2	11.2
Other durable housefurnishings #	30.3	28.3	27.1	24.4
Semi-durable housefurnishings ##	14.8	13.9	13.3	12.3
Home entertainment (TV, radios, records, musical instruments, etc.)	40.8	36.1	31.5	28.2
Household supplies (cleaning, lighting, paper products, etc.)	27.3	26.2	25.1	23.6

	% TO TOTAL DISPOSABLE INCOME			% TO TOTAL EXPENDITURES		
Selected Expenditures	1986(p)	1985(r)	1984(r)	1986(p)	1985(r)	1984(r)
Total expenditures	94.2%	93.0%	91.0%	100.0%	100.0%	100.0%
Durable goods	13.5	13.0	12.6	14.4	14.0	13.8
Nondurable goods	31.6	32.3	32.5	33.6	34.7	35.7
Services	49.1	47.6	46.0	52.1	51.2	50.5
Selected Products						
Food & non-alcoholic beverages, total	16.8	16.7	16.8	17.8	18.0	18.5
Food & beverages for off-premise consumption	11.2	11.3	11.5	11.9	12.2	12.6
Toilet articles & preparations	0.8	0.8	0.8	0.9	0.9	0.9
Footwear	0.8	0.8	0.8	0.9	0.9	0.9
Clothing & accessories, total	4.8	4.7	4.7	5.1	5.1	5.1
Women's, girls', infants'	3.2	3.2	3.1	3.4	3.4	3.4
Men's, boys'	1.6	1.5	1.6	1.7	1.7	1.7
Homefurnishings, total	5.2	5.0	5.0	5.5	5.4	5.4

Note: Columns may not add to totals shown due to rounding of figures and/or expenditure categories included in totals but not separately reported.

(p) preliminary (r) revised
(e) estimated based on revised weightings reported by the Bureau of Labor Statistics

* Includes expenditures not separately shown, such as the value of food furnished to government and commercial employees, including military, food produced and consumed on farms, etc.

(footnotes continued)

** The retail value of all types of homefurnishings (appliances, floor coverings, etc.) supplied by builders in new privately-owned housing units are included in personal consumption expenditures. However, such items supplied in rental apartments or other-than privately-owned housing are not included.

Principal furnishings included in "other durable housefurnishings" are floor coverings, blankets, comforters, pillows, picture frames, mirrors, art products, lamps, clocks, writing equipment, hand and power tools. (A durable product is defined as having a useful life of three years or more; nondurables, a useful life of less than three years).

Consists mainly of textile homefurnishings except where elsewhere classified, including piece goods for homefurnishings. Also included are lamp shades, brooms and brushes.

Source: Based on reports from the Office of Business Economics, U.S. Department of Commerce

Housing Sales/Ownership

An important aspect of the consumer market is the level of home ownership. The National Association of Realtors estimates that about 3.5 million single-family dwellings in the suburbs were sold in 1987 for a total of $371 billion. This represents the cream of the housing market, made up to a large extent by sales to young families. In the longer term, as the baby-boom generation moves into their 40s and 50s, turnover of housing is expected to be reduced.

In 1987, sales of new homes fell 10.1% below their 1986 level, according to the Department of Commerce. Sales of single-family homes totaled 674,000 units in 1987, down from an eight-year high of 750,000 in 1986. Higher mortgage rates and a slowdown in demand after five strong years of sales were cited as causes for the current decline. Rising home prices, particularly in the Northeast, also dampened demand. Affordability will be a major factor in the 1988 outlook, along with mortgage rates. The median price of a new home in December 1987 was $108,900, down from $117,000 in November.

A Federal Reserve Board study (Federal Reserve Bulletin, December 1987) showed that mortgage costs for a standard-quality new home, which had reached as high as 45% of mean household disposable income during the early 1980s, fell to about 20% in early 1987. However, the National Association of Home Builders' surveys indicated that the proportion of first-time buyers among all new home buyers declined from about 40% in 1984 to about 36% in the first quarter of 1987, primarily due to the high cost of homes.

Rates of Homeownership, by Age of Household Head
Selected Years, 1981-1987

Age (years)	1987*	1985	1981
Under 30	29.0	29.8	34.4
30 to 39	58.3	58.8	63.1
40 to 64	76.3	75.0	77.3
65 or more	75.1	75.0	73.9
All	63.8	63.9	65.4

* First half

Source: Bureau of the Census (Federal Reserve Bulletin, December 1987)

SCHEDULE OF ADDITIONAL FACT FILES

THE CHILDREN'S MARKET: INFANTS', TODDLERS', GIRLS' AND BOYS' (APPAREL, PLAYTHINGS & RELATED PRODUCTS: Includes a detailed statistical profile of the U.S. industry, i.e. number and size of manufacturers, production and shipments, employment trends and more. Also details imports and exports by product. At the retail level, this Fact File covers sales estimates, information on leading outlet types and on consumer price trends. The size of the growing potential market in terms of population counts and birth projections is outlined as well as consumer preferences and buying patterns in the consumer market.

CONSUMER MARKET DEVELOPMENTS: An overview of all facets of the consumer market. Within the framework of population and income groups, the markets for children's products, for young adults and for the mature are defined in terms of numbers and buying power. Trends and projections are included as well as an analysis of developments that are shaping the U.S. consumer market -- living arrangements, households, working women, marriage and birth rates, etc. Trends in personal consumption expenditures are also covered.

DEPARTMENT STORE AND SPECIALTY STORE SALES (1987 Edition): Updates information in the 1986 Edition on department and apparel specialty store sales (not including discount operation) for stores (buying headquarter locations) listed by state within the four major geographical regions of the U.S. Information on the number of stores in operation is included, as well as on plans to open stores, if available. Available data on sales of branch stores is included. Additional features include: An alphabetical listing of major national chains in the general merchandise and apparel store classifications with the latest available sales figures; a listing and sales figures for traditional department stores which have sales volumes published, or estimated, of $50 million or more in 1986; a list of conglomerates operating traditional department and apparel stores, including the names and locations of these stores.

DRESSES & CAREER APPAREL (WOMEN'S, MISSES' AND JUNIORS'): At the manufacturer level, provides a statistical profile of the dress industry and the products made within this industry, including dresses, career apparel, pants dresses, ensembles, etc. Includes number and size of manufacturers, production and value of shipments, industry location and trends in employment levels. Analyzed is the growing impact of imports on total growth in the size of the consumer market, based on population counts, working women by type of occupation, and more.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Covers developments in the U.S. industry, in imports and in retail sales for fashion accessories, including small leather goods, handbags, millinery, scarves, gloves, belts, jewelry, sunglasses, watches, etc. to the extent that statistical information is available. Included are production and shipments by U.S. manufacturers plus the quantity and value of imports in recent periods. Retail sales and operating results in department and specialty stores are reported, as well as summaries of available studies on consumer buying preferences.

FOOTWEAR (MEN'S, WOMEN'S, BOYS', GIRLS') (1987 Edition): Updates the 1986 edition with figures on U.S. manufacturers production and shipments by type of footwear. Also detailed statistics on imports and their impact on total U.S. market supply. Analyses industry trends and performance of major resources and retailers. Spotlights developments in the athletic footwear industry and consumer market. At the retail level, information is included on sales trends and merchandising results for shoe stores and for footwear departments in department stores; as well as consumer purchase patterns.

HOME TEXTILES & RELATED PRODUCTS: Includes the latest statistics on the U.S. industry, including manufacturers wide variety of products -- bed linens, towels, blankets, comforters, slip covers, pillows, curtains/draperies and hardware, shades, and blinds. Covers the changing competitive nature of the industry through acquisitions of major producers and through consolidation of buying power at the retail level. Includes information on production, shipments and retail sales.

HOSIERY/LEGWEAR/BODYWEAR (MEN'S, WOMEN'S, BOYS', GIRLS'): A comprehensive report on mills making hosiery and related products, including production and shipments, fiber consumption, producer price trends. The growing trend in imports is also covered. At the consumer level, the size of the potential market is measured in terms of population counts and projections and estimates are included on retail sales of major products by type of retail outlet.

HOUSEHOLD FURNITURE AND BEDDING: Provides an overall view of market trends in the U.S. For the U.S. industry, the report covers statistics on manufacturers, on production and shipments in terms of quantity and value by type of furniture. Trends in the concentration levels in the U.S. industry are reported, as well as in employment and earnings in the industry. Also included is information on the industry in leading states. Consumer market information includes data on characteristics of new housing units (number of rooms); also trends in consumer expenditures for furniture, sales by type of outlet. Details on furniture stores, including the 25 leaders, are also covered.

MEN'S FURNISHINGS AND WORK/CAREER APPAREL: Provides a summary of major market trends in men's shirts, (dress and sport), underwear, nightwear, robes, hosiery and headwear, as well as the growing market for work/career apparel. These products are covered at the U.S. industry level, including production and shipments, employment trends and manufacturer concentration levels. Imports are detailed by product in terms of quantity and value, as well as exports. Data at the retail level includes sales and operating results in men's furnishings in department and specialty stores. The potential market for work/career apparel is defined in data on trends in employment of men by occupation.

MEN'S SPORTSWEAR, CASUALWEAR, OUTERWEAR: The wide variety of men's wear items included are covered from available statistical information on the industry at the manufacturer, retailer and consumer levels. Included is information on production and shipments by domestic producers, imports and exports. The retail market is covered in sales estimates and data on major outlet types, as well as studies of consumer buying practices.

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